



EPA CLEAN SCHOOL BUS

2023 EPA Clean School Bus Rebate Forms: Close Out Form User Guide

March 2026



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Before You Begin

This guide will walk you through the steps needed to create, edit, submit, and view the Close Out Form for your 2023 Clean School Bus (CSB) rebate. 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 eight or more hours** to complete the Close Out Form. You do not need to complete it in one session: you can save the Form and come back at any time.

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

- 1. Confirm the point of contact.** Confirm that the email of the person that plans to complete the Close Out Form is registered as a designated Government Business (or Alternate) or Electronic Business (or Alternate) Point of Contact (POC) in your organization's active SAM.gov entity registration. Otherwise, the person will not be able to access the rebate application system. For more information regarding SAM.gov POCs, please see the ["Who Can Submit a Rebate Application?"](#) section of the CSB Rebate website.
- 2. Review the glossary of terms** in Appendix A.
- 3. Compile all required data.** Appendix B provides a printable list of all necessary data fields.
- 4. Check the 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 sections in this guide follow the order in which you will complete the Close Out Form. There is also a Glossary section that defines terms and abbreviations to reference while going through this guide and the online Form.

1. Sign In/Register

Use your existing SAM.gov credentials to log in to your Clean School Bus Rebate Forms applicant dashboard. If you are unable to sign in, please refer to the [2023 CSB Rebate Application User Guide](#) for instructions on how to update your SAM.gov information.

2. Applicant Information

2.1 Start a New Close Out Form

After signing in to your applicant dashboard, you will see the “Clean School Bus Rebate Forms” dashboard. Select **2023** in the **Rebate Year** drop-down menu.

Clean School Bus Rebate Forms

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

Dashboard

Rebate Year: 2023

Select the **New Close Out** button to begin.

Your Rebate Forms

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

- For the 2024 rebate year, you may request edits or a withdrawal by selecting Change Request, Change.
- For the 2023 rebate year, you may request edits, an extension, or a withdrawal by selecting Change Request, Change.
- For the 2022 rebate year, you may request edits, a withdrawal, or a Close Out Form extension (see [Close Out Form webpage](#)) by emailing cleanschoolbus@epa.gov.

Rebate ID	Form Type Form Status	UEI EFT Indicator	Applicant School District	Updated By Date Updated	Change Request
<input type="button" value="View"/> 033320	Application Selected	123456000153 1234	Bridge Heights, Inc. Spring Street School District	evan@hollandreg.com 10/29/2025	Change <input type="button" value=""/>
<input type="button" value="View"/>	Payment Request Funding Approved			evan@hollandreg.com 10/31/2025	Change <input type="button" value=""/>
<input type="button" value="New Close Out"/>					

Note: 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. It is best practice to select the Save button at the bottom of the page each time you enter additional information.

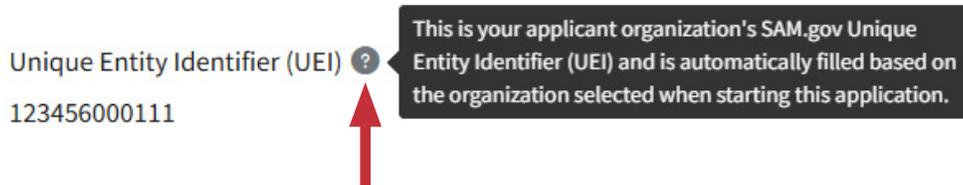
2.2 Welcome

Review the text on the “Welcome” page to determine what information you will need and how to complete the Close Out Form, then select **Next** at the bottom of the page 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 located at the bottom of the Form page.

2.3 Information Icons and Mandatory Fields

Hover your mouse over the information icons (i.e., circles with question marks), which are found throughout the Close Out Form pages, for more information and instructions on specific fields.



Mandatory fields that are editable are marked with a “*” to the right of the field name. Unless otherwise denoted, these fields must be completed before proceeding to the next page or selecting a **Complete** button on a page.

Some fields are mandatory to complete before the Close Out Form can be submitted to the EPA but can be left blank as you move through the Close Out Form. Look for this message below these fields, “This field is mandatory to complete the Close Out Form but is not required to complete and save the [page name] information.” For these fields, you may save your work and navigate to other sections or pages to update or add missing information and then return to the field to complete it.

2.4 Applicant Information

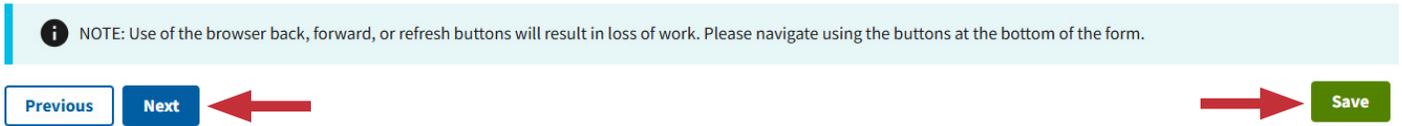
The “Applicant Primary Contact” and “Applicant Alternate Contact” information fields will prepopulate with information from the associated Payment Request Form. Double-check that your primary and alternate contact information is correct. To update the contact information for the primary contact, select “Update Primary Contact” and update the relevant field(s). To replace the primary contact with a different person, select “Replace Primary Contact” and provide the new contact’s name, title, phone number, and email address. Follow the same steps to update or replace the alternate contact. You can also add a new alternate contact if no alternate contact was provided on the Payment Request Form. Select **Next** to continue. Note: The Applicant Primary and Alternate Contact fields can only be updated one at a time. If you choose to either replace or update Primary or Alternate contact by mistake, you must uncheck the selection box to select the other option.

The image shows a section titled "Applicant Primary Contact" with two options, each with an unchecked checkbox and a question mark icon:

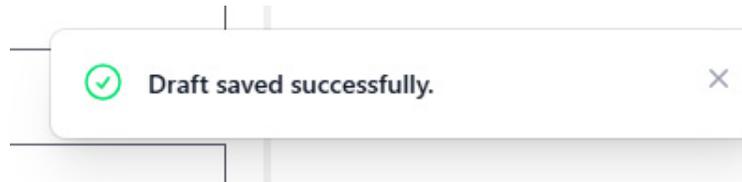
- Update Primary Contact ?
- Replace Primary Contact ?

2.5 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 page will be saved automatically when the **Next** button is selected. In addition, you can use the **Save** button to save information before proceeding to the next page.



When you click **Next** or **Save**, a box will pop up in the top right corner of your screen confirming your information has been saved.



Note: You will lose work if you use your browser's back, forward, or refresh buttons while in the Close Out Form. Instead, navigate using the **Next** and **Previous** buttons.

After saving and exiting the Close Out Form, you can return to the "Clean School Bus Rebate Forms" screen later. Open the "draft" form by selecting the **Edit** button and proceed by navigating to where you left off. Selecting forms with a "Submitted," "Funding Approved," or "Selected" status will allow you to view, but not edit, your entries.

Additionally, you can submit a change request for any form that has been created. The Change Request Form allows you to edit, extend, or withdraw a form depending on its status.

View	033303	Application Selected	123456000111 1234	AMT123456789 See Page 1 of 1	amt12345@eng.com 9/11/2025	Change ↗
View		Payment Request Funding Approved			amt12345@eng.com 9/11/2025	Change ↗
Edit		Close Out Draft			amt12345@eng.com 1/8/2026	Change ↗

3. School District Information

The “School District General Information” and “School District Prioritization Information” sections of this page will prepopulate based on the National Center for Education Statistics (NCES) District ID entered on your application or later updated through a school district change request. These two sections are not editable in the Close Out Form and can only be updated through a school district change request approved by the EPA. If the school district change is approved, the updated school district will replace the original school district. If the Close Out Form is in an “Edit Requested” status or if the approved new school district is not correctly listed, please select **Refresh School District Information**. If the new school district information is not populating correctly, please email the CSB Helpline at cleanschoolbus@epa.gov.

3 of 11 School District Info

This is the school district that the new replacement buses will serve for at least five years. The School District General Information and School District Prioritization Information is based on the NCES District ID you entered on your application form and is not editable here. If the school district that the new replacement buses serve needs to be changed, the request for change must be approved by EPA utilizing the Change Request form for this rebate. If needed, you can update the School District Contact Information below.

* denotes required field

Refresh School District Information



i To change the school district that replacement school buses will serve for the next five years, you must send an email to cleanschoolbus@epa.gov with the email subject being, "School District Change", the type of request, the NCES ID for the new school, the new school name, and contact person (including first name, last name, title, business email, and business phone number). When replacing a school district with another one, the district must be in the same state and have the same school district prioritization or higher.

School District General Information

National Center for Education Statistics (NCES) District ID

School District Name

City

Physical Address Line 1

State or Territory

Physical Address Line 2

Zip Code

School District Prioritization Information

Prioritized **?**

Yes

Are you self-certifying as prioritized? **?**

Priority Reason **?**

High Need Tribal Rural

Double-check that your school district contact information is correct. To update the contact information, select **Update School District Contact** and edit the relevant field(s). To replace the school district contact with a different person, select **Replace School District Contact** and provide the new contact’s name, title, phone number, and email.

Select **Next** to continue.

4. Add Organizations

Review the information on this page to understand the types of organizations for which you will need to provide information. Required organizations include the entity(ies) that took control of the existing bus(es), the owner(s) and dealer(s) of the new bus(es), and owner(s), supplier(s), new bus service provider(s), electrification as a Service (EaaS) provider(s), and installer(s) of electric bus charging infrastructure, if applicable.

Select **+ Add Organization** to proceed.

4 of 11 Organizations

This page is for adding organization information for existing buses, new buses, private fleets, infrastructure, and telematics. Organizations that you entered in your Application and Payment Request forms are already included on this page. Here you can update organizations already entered, or enter new organizations. For each organization that you add by selecting the "+Add Organization" blue box, you'll need to select the organization type(s) and then enter the name, 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 strongly recommended that you add all the organizations that are associated with this rebate at this time to avoid having to return to this page later.** The following organization types can be entered on this screen:

- **Scrap Yard (existing bus):** Any organization that scrapped an existing bus.
- **Donee (existing bus):** Any organization that received a donated existing bus from the applicant.
- **Purchaser (existing bus):** Any organization that purchased an existing bus from the applicant.
- **Existing Bus Owner:** All existing bus owners. If the existing bus owner is the applicant, the school district that the new buses will serve, or a private fleet entered in your application or Payment Request form, then you do not have to enter existing bus owner information as it's already included within this form.
- **New Bus Owner:** All the 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 private fleet entered in your application or Payment Request form, then you do not have to enter new bus owner information as it's already included within this form.
- **Private Fleet (existing or new buses):** Any private fleet for existing or new buses that is not the applicant needs to be entered here unless you already entered the private fleet(s) in your application, or Payment Request form. Selectees may list multiple private fleets here.
- **New Bus Dealer:** The vendor or dealer that the new bus owner purchased the bus from needs to be identified.
- **New Bus Service Provider:** An organization that provides new buses and other services to new bus owners through a service agreement.
- **Infrastructure Owner (electric bus charging):** All infrastructure owners (e.g. school district, private fleet) of the electric bus charging equipment needs to be identified. If the infrastructure owner is the applicant, the school district that the new buses will serve, or a private fleet entered in your application or Payment Request form, 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 (includes the installer of the infrastructure charging equipment when they are also the charging equipment supplier).
- **Electrification as a Service (EaaS provider):** An organization that provides charging services through a service agreement.
- **Infrastructure Installer:** Organization that installs structures and equipment (e.g. trenching, vehicle pads, and wiring that excludes charger installers when the charger is installed by the infrastructure charging equipment supplier) that are part of the eligible CSB rebate.
- **Other Infrastructure Organization:** All other eligible Infrastructure organizations that are not a infrastructure installer, supplier, or owner (e.g. project management, design, and permitting only).
- **Telematics Contact (optional):** The organization responsible for supplying bus and EVSE telematics data to EPA or its partners for participation in research.

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

* denotes required field

Organizations			
Edit	Organization 1	Org. Name: School Bus Sales Type: New Bus Dealer Contact Name: Mary Bus Address: 1234 Street, City, Alaska	Delete
+ Add Organization			



4.1 Organization Information

Select an organization type by checking the appropriate box(es). If a single organization serves multiple roles, enter the organization once and check all applicable boxes for **Organization Type**.

The screenshot shows the 'Organizations' form. On the left, 'Organization # 1' is listed. The 'General Information' section contains a list of organization types. A red arrow points to the 'New Bus Owner' checkbox, which is checked. To the right, the 'Organization Name' field contains the text 'New Bus Owner' and is highlighted with a blue border. Another red arrow points to this field.

Review the requirements for each organization in the informational text at the top of this page (Page 4 of the Form). Take note of the organization types that **do not need to be included** on this page if they are **already entered as the applicant organization or school district**.

Once you select an organization type(s), enter the organization's name, address, and contact information. If the organization was included in the Payment Request Form, then the "Address" and "Contact Information" sections are prepopulated from the Payment Request Form but can be edited as necessary.

The screenshot shows the 'Address' and 'Contact Information' sections of the form. The 'Address' section contains six fields: Organization Address 1 (1234 Street), Organization City (City), Organization Address 2, Organization State or Territory (Alaska), Organization County (County), and Organization Zip (12345-____). The 'Contact Information' section contains two buttons: 'Update Organization Contact' and 'Change This Contact to Another Person'. Below these are five fields: Organization Contact First Name (Mary), Organization Contact Last Name (Bus), Organization Contact Title (Manager), Organization Contact Business Email (mbus@sales.org), and Organization Contact Business Phone Number ((123) 456-7890).

When all fields have been entered for the organization, select the **Complete** button.

Note: This button does not save your form. You must select the **Save** or **Next** buttons to save your information.

The screenshot shows a 'Contact Information' form with the following fields and values:

Field	Value
Organization Contact First Name	Mary
Organization Contact Last Name	Bus
Organization Contact Title	Manager
Organization Contact Business Email	mbus@sales.org
Organization Contact Business Phone Number	(123) 456-7890

Below the form are three buttons: 'Complete' (blue), 'Cancel' (red), and '+ Add Organization' (dark blue). Red arrows point to the 'Complete' and '+ Add Organization' buttons.

Add another organization by selecting **+ Add Organization** at the bottom of the page. You may add as many organizations as needed and delete or edit them at any time. Note that 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" page before moving on.

If you select **Complete** before all required rows are filled out, the missing field(s) will appear in red.

The screenshot shows an 'Address' form with the following fields and values:

Field	Value
Organization Address 1	1234 Street
Organization Address 2	
Organization City	City
Organization State or Territory	Colorado
Organization Zip	12345-____
Organization County	Organization County is required

The 'Organization County' field is highlighted in red, indicating a required field that is missing.

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

4.2 Add Documents

On this page, you will add information about new buses and any infrastructure. This information includes uploading all final invoices and proof of delivery documents for both buses and infrastructure. Select **+ Add Document** to begin.

Note: Documents for propane and compressed natural gas (CNG) infrastructure are not needed, as their infrastructure is not eligible for rebate funding. Documents should only be uploaded for buses and infrastructure that were purchased with CSB rebate funds.

5 of 11 Documents

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

- **Final invoices** Final invoices for all new buses and infrastructure. For each invoice, indicate whether it includes bus(es), electric bus charging equipment, or other infrastructure installation costs by clicking on the applicable checkboxes under Document Purpose. Purchasers and vendors associated with each invoice must be selected as well. You can also select whether an invoice applies to all buses and/or infrastructure and this information will be automatically added to the Buses and/or Infrastructure pages.
- **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. Purchasers and vendors associated with each proof of delivery must be selected as well. You can also select whether a proof of delivery applies to all buses and/or infrastructure and this information will be automatically added to the Buses and/or Infrastructure pages.

* denotes required field

The screenshot displays a 'Documents' section with a table containing one document entry. The entry has the following details:

Document	Type	Purpose	Document Name	Vendor	Note
1	Final Invoice	Electric Bus Charging Equipment	Test Document	School Bus Sales	

Buttons for 'Edit' and 'Delete' are visible next to the document entry. A red arrow points to the '+ Add Document' button located below the table.

4.3 Add Document Information

The fields in the screenshot below appear after you select **+ Add Document**.

The screenshot shows a 'Documents' form with the following fields and actions:

- Document Name:** Text input field containing 'Test Document'. A red arrow points to this field.
- Document Description:** Text area for additional information.
- Document Purpose (Choose all that apply):** Checkboxes for 'New Bus', 'Electric Bus Charging Equipment', and 'Other Infrastructure Installation Costs'. A red arrow points to the 'Apply Final Invoice to all buses' button below.
- Document Type:** Drop-down menu with 'Final Invoice' selected. A red arrow points to the 'Apply Final Invoice to all charging infrastructure' button below.
- Associated Purchaser:** Drop-down menu with 'Org. Name: [redacted] | Contact Name: John [redacted]'.
- Associated Vendor:** Drop-down menu with 'Org. Name: School Bus Sales | Contact Name: Mary Bus'.
- Document Upload:** Table with columns 'File Name' and 'Size'. A file named 'Test_Document.pdf' (7.42 kB) is listed. A red arrow points to the 'Complete' button at the bottom left.
- Allowed file types:** *.pdf, *.png, *.jpeg, *.jpg. Minimum file size: 1KB. Maximum file size: 5MB.
- Buttons:** 'Complete' (blue) and 'Cancel' (red) at the bottom left.

Enter the document name. Make sure each document's name is unique; it will be used to refer to the document elsewhere in the Form. You can also enter a description, but it is not required. Select the document purpose by checking the box(es) that apply. Next, select a document type, either final invoice or proof of delivery, using the drop-down menu. Select the associated purchaser and associated vendor from the drop-down list. The options in the drop-down menu are the organizations you added on Page 4 of the Close Out Form. If you do not see the organization you need to select, then select the **Return to Organizations Page** button at the bottom of the page and add the organization's information there.

The screenshot shows the bottom navigation area with the following elements:

- Return buttons:** 'Return to Organizations Page', 'Return to Bus Information Page', and 'Return to Infrastructure Page'. A red arrow points to the 'Return to Organizations Page' button.
- 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.
- Navigation buttons:** 'Previous', 'Next', and 'Save'.

Before uploading a **bus invoice**, verify that it includes the following information:

- Manufacturer
- Model
- Model year

- Fuel type
- Vehicle Identification Number (VIN)
- Gross Vehicle Weight Rating (GVWR)
- Total cost of each bus
- Date of delivery; if the bus invoice does not contain the date of delivery, please ensure that the proof of delivery document includes the date of delivery, e.g., delivery receipt, or bill of lading.
- Dealer/vendor letterhead

Before uploading an **infrastructure invoice**, verify that it includes the following information:

- Date of equipment delivery; if the infrastructure invoice does not contain the date of delivery, please ensure that the proof of delivery document includes the date of delivery, e.g., delivery receipt, or bill of lading.
- Vendor information (business name, phone, address, email address)
- Charger model, make, model year
- Quantity of pedestals
- Itemized list of services performed (if applicable)
- Itemized list of supplies used for installation services (if applicable)

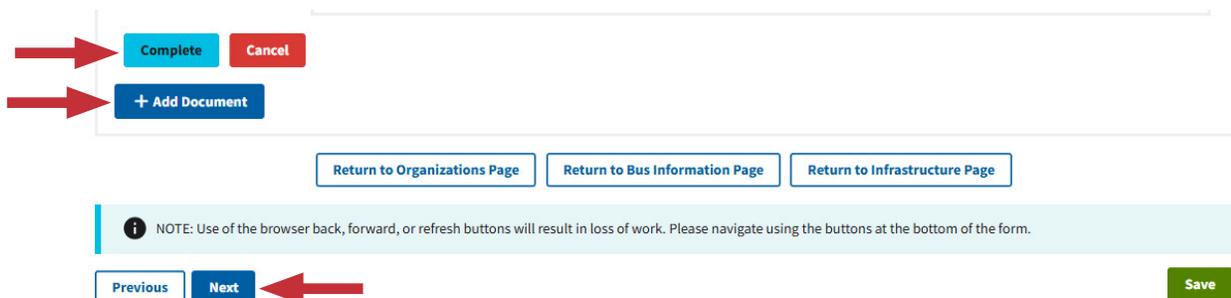
The **proof of delivery document** must show the shipping company information and the date of delivery. (For example, a dated bill of lading would qualify.)

Next, upload a PDF or image of each invoice and proof delivery document(s) outlined immediately above. The information you enter on the Close Out Form must match the information on the bus and infrastructure invoices and proof(s) of delivery. If necessary, please create multiple infrastructure line items to appropriately state the eligible cost of infrastructure as stated in submitted invoices.

If you are uploading an invoice and it includes all the buses purchased, all the charging infrastructure purchased, or all the other infrastructure purchased, select the **Apply Final Invoice to all buses**, **Apply Final Invoice to all charging infrastructure**, and **Apply Final Invoice to all other infrastructure** buttons as applicable. If you are uploading a Proof of Delivery document and it includes all the buses purchased or all the charging infrastructure purchased, select the **Apply Proof of Delivery to all buses** and **Apply Proof of Delivery to all charging infrastructure** buttons as applicable.

Next, select the **Complete** button for the document. *(Note that this button does not save your form; you must select the **Save** or **Next** button to save your information.)*

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



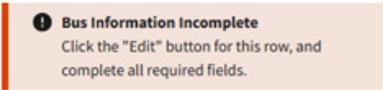
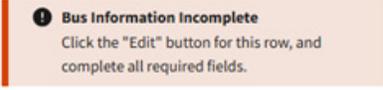
5. Bus Information

Review the instructions at the top of the “Buses” page to identify the information needed to complete the fields on this page.

General Information	
Number of School Buses in Current Fleet 	Number of Electric School Buses in Current Fleet 
<input type="text" value="10"/>	<input type="text" value="5"/>

Enter the total number of school buses in your current fleet and the number of electric school buses within your current fleet. For example, if you have 10 buses in your current fleet and 5 of them are electric, enter “10” in **Number of School Buses in Current Fleet** and “5” in **Number of Electric School Buses in Current Fleet**.

The buses listed in the “Bus Information” section are the existing buses that were entered on your Payment Request Form. If the bus information is incomplete, you will see a message in red next to the bus number. Select the **Edit** button next to each bus in the list to complete any missing information as necessary.

Bus Information			
<input type="button" value="Edit"/>	Bus 1	Existing Bus VIN: 12423523523523231 Existing Bus Fuel Type: Diesel New Bus Fuel Type: Electric	 1 Bus Information Incomplete Click the “Edit” button for this row, and complete all required fields.
<input type="button" value="Edit"/>	Bus 2	Existing Bus VIN: 23523523545454444 Existing Bus Fuel Type: Diesel New Bus Fuel Type: Propane	 1 Bus Information Incomplete Click the “Edit” button for this row, and complete all required fields.

Select **Edit** to enter information about the existing and new buses.

5.1 Swap or Exclude a Bus

At this point, you can swap out existing buses or exclude buses from your fleet. **Swap Existing Bus** indicates that you would like to scrap, sell, or donate a different bus from the bus you listed to scrap, sell, or donate on your Payment Request Form. **Exclude Bus** indicates that you no longer want to replace a bus you listed on your Payment Request Form with a new bus. If you do not intend to swap or exclude an existing bus, do not check these boxes and continue completing fields that are editable in the “Existing Bus Information” section.

Existing Bus Information	
<input type="checkbox"/> Swap Existing Bus 	<input type="checkbox"/> Exclude Bus 

If you are swapping out an existing bus for a different existing bus, select a reason for swapping the existing bus from the drop-down menu. Note that if you select **“Other”** in the drop-down menu, then you will need to provide a reason in the text field for swapping out the existing bus. Next, choose the existing bus owner from the drop-down menu. If you do not see the owner, select **Return to Organization Entry** to add them. Then, you will need to complete the **“Existing Bus Information”** and **“New Bus Information”** sections.

If you choose to exclude a bus, the EPA must be reimbursed for the maximum eligible rebate for this bus plus any shipping or Americans with Disabilities Act (ADA)-compliance costs you received for that bus. The reimbursement required for the maximum eligible rebate for this bus will be displayed on the **“Funding”** page of the Form, and any ADA-compliance or shipping costs that you received a rebate for on an excluded bus will be displayed on the **“Buses”** page.

A warning will pop up with the amount of money you will owe to the EPA. Importantly, note that the **Bus ADA and Shipping Reimbursement Owed to EPA** field is only the amount owed for the shipping or ADA-compliance portion of your rebate. The total amount owed will be reflected on the **“Funding”** page of the Form. The EPA will provide information on how to reimburse the funds when you submit your Close Out Form.

! Warning - Rebate Amount Refund Required

Excluding a bus from the Close Out Form, or changing the bus information in a way that reduces the eligible rebate amount, after receiving a rebate may require a refund back to the EPA. Additional actions will be necessary after submittal and review of the Close Out Form to settle this balance.

Bus ADA and Shipping Reimbursement Owed to EPA ?	\$30,000.00
Rebate Owed to EPA from Bus Exclusion or Rebate Reduction ?	\$320,000.00

Note: If you accidentally select **Swap Existing Bus** or **Exclude Bus**, select **Cancel** at the bottom of the **“Bus Information”** section and your data will be restored.

5.2 Existing Bus Information

The data fields associated with existing buses are listed below, with required fields marked with asterisks. Select **Complete** after entering your information. For field definitions that are prepopulated from the Payment Request Form, see the [2023 Clean School Bus Rebate Forms: Payment Request User Guide](#).

Bus Information

Bus # 1

Existing Bus Information

Swap Existing Bus Exclude Bus

Existing Bus Owner
Org Name: Boeing School District | **Contact Name:** Jane Doe
This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.

Existing Bus VIN: 11111111111111111111
Existing Bus Odometer: 50,000 mi
Existing Bus NCES District ID: ██████████
Existing Bus Fuel Type: Diesel
Existing Bus Manufacturer: Other
Existing Bus Model Year: 2000
Existing Bus GVWR: 31,000 lbs
Existing Bus Manufacturer (Other): Bus Co.
Existing Bus EPA Vehicle Family: abcdsgsdfd
Existing Bus Model: Model

Existing Bus Average Annual Fuel Consumption: 5,000 gal
Estimated Remaining Life: 5 yr
Existing Bus Average Annual Mileage: 20,000 mi
Existing Bus Annual Idling Hours: 500 hr
Replacement Process: **Scrapped**
Scrap Yard Organization
Org. Name: Scrap Yard | **Contact Name:** Scrap Yard
This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.

Existing Bus Proof of Scrappage, Sell, or Donation

File Name	Size
Drop files to attach, or browse	

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

1. The **Existing Bus Owner*** field requires you to choose the organization that owned the bus before replacement. If you do not see the owner in the drop-down menu, select **Return to Organization Entry** to add them.
2. **Existing Bus Vehicle Information Number (VIN)** is prepopulated from the information in the Payment Request Form and is not editable.

3. **Existing Bus Odometer (miles)*** needs to be populated with the odometer reading of the existing bus at the time of scrappage, donation, or sale. If the exact reading is unknown, provide an estimate.
4. **Existing Bus NCES District ID** is prepopulated with the school district ID from the Payment Request Form and is not editable.
5. **Existing Bus Fuel Type** is prepopulated from the information in the Payment Request Form and is not editable.
6. **Existing Bus Model** is prepopulated from the information in the Payment Request Form and is not editable.
7. **Existing Bus Fuel Type** is prepopulated from the information in the Payment Request Form and is not editable.
8. **Existing Bus Manufacturer** is prepopulated from the information in the Payment Request Form and is not editable.
9. **Existing Bus GVWR** is prepopulated from the information in the Payment Request Form and is not editable.
10. **Existing Bus Model Year** is prepopulated from the information in the Payment Request Form and is not editable.
11. **Existing Bus EPA Vehicle Family*** needs to be populated with the 12-character alphanumeric EPA Vehicle Family name or the 10-to-12-character California Air Resources Board (CARB) Executive Order ID.
 - a. To identify the EPA Vehicle Family, refer to the Vehicle Emission Control Information (VECI) label of the existing bus. Do not refer to an invoice for the vehicle family name of an existing bus. The VECI is usually on or near a door pillar or on the engine compartment sheet metal.
 - i. Vehicle Family information is also available at the EPA website but should only be used if the VECI label is missing on the existing bus: visit the [Certification Data Spreadsheets](#) page, download "Heavy-Duty Vehicle Certification Data (Model Years: 2015 – Present)," and search the spreadsheet for your bus model. You may also use the "Archive (Model Years" 1982 – 2016)" data that are listed within the Certification Data Spreadsheets page. The first letter of the EPA Vehicle Family represents the model year; see the EPA's [page on Vehicle Family naming](#) for a list of letters and model years.
 - b. If the bus is not an EPA-certified vehicle, enter the CARB Executive Order ID.
 - c. If the vehicle does not have EPA or CARB certification, contact the [Clean School Bus helpdesk](#).
12. **Existing Bus Average Annual Fuel Consumption** is prepopulated from the information in the Payment Request Form and is not editable.
13. **Estimated Remaining Life** is prepopulated from the information in the Payment Request Form and is not editable.
14. **Existing Bus Average Annual Mileage** is prepopulated from the information in the Payment Request Form and is not editable.
15. **Existing Bus Annual Idling Hours** is prepopulated from the information in the Payment Request Form and is not editable.

- 16. Replacement Process*** requires you to specify how the existing bus was replaced (scrapped, sold, or donated). Model year 2010 and older buses can only be scrapped. Model year 2011 and newer buses can be scrapped, sold, or donated. If you sold or donated the existing bus to a scrapyard, please state that the bus was scrapped rather than sold or donated.
- 17.** If the existing bus was scrapped, the **Scrap Yard Organization*** field will appear. Select the scrap yard from the drop-down menu (in some cases, your own organization may have completed the bus scrappage). Next, upload the following documents for the **Existing Bus Proof of Scrappage, Sale, or Donation**:
- a.** Photographs of the destroyed engine and chassis rail for each scrapped bus.
 - i.** Each photo must be clearly labeled with the last four digits of the bus VIN, either on the photo itself or in the file name.
 - ii.** See Appendix C of the [Program Guide](#) for example scrappage photos.
 - iii.** Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
Minimum file size: 1KB
Maximum file size: 5MB
 - b.** A letter signed by a representative of the scrap yard or other entity that performed the scrappage that:
 - i.** Lists the VINs of the bus(es) that was (were) scrapped.
 - ii.** Affirms the date(s) that the bus(es) was (were) scrapped.
 - iii.** Details the method of scrappage (which must align with the requirements outlined in the [2023 Clean School Bus Rebates Program Guide](#)).
 - iv.** Lists contact information for the entity that performed the scrappage. See Appendix D of the [2023 Clean School Bus Program Guide](#) for a template of a scrappage letter that fleets can use.
- 18.** If the existing bus was sold or donated, then the **Existing Bus Sold To or Existing Bus Donated To*** field will appear. Select the organization that the bus was sold or donated to from the drop-down list.
- a.** If the organization does not appear in the drop-down menu, return to the “Organizations” page by selecting **Return to Organization Entry** near the bottom of the page and enter the required information. Note: To avoid losing any information for this bus, complete the remainder of the fields for the existing and new bus and select the “Complete” and “Save” buttons.
 - b.** If the existing bus was sold or donated, you must submit either the receipt of sale or receipt of donation within the Close Out Form in the **Existing Bus Proof of Scrappage, Sale, or Donation** field.

5.3 New Bus Information

- 1.** The options for **New Bus Owner*** are generated from the entries on the “Organizations” page with an organization type of “New Bus Owner”. The drop-down options also include the selectee and the school district. If the organization does not appear in the drop-down menu, return to the “Organizations” page by selecting **Return to Organization Entry** (see note below) and enter the required information.

2. The options for **New Bus Service Provider** are generated from the entries on the “Organizations” page with an organization type of **New Bus Service Provider**. If the organization does not appear in the drop-down menu, return to the “Organizations” page by selecting **Return to Organization Entry** (see note below) and enter the required information.
3. **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, return to the “Documents” page by selecting **Return to Document Entry** (see note below).
4. The options for **Final Invoice*** are generated from the entries on 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, return to the “Documents” page by selecting **Return to Document Entry** (see note below) and enter the required information.
5. **New Bus Dealer** is prepopulated with the vendor associated with the final bus invoice. If it is incorrect, you will need to go back to the “Documents” page and select the Final Invoice that needs edits. Then, update the **Associated Vendor** field within order document and select the “Complete” followed by the “Save” button to save the changes made.

Note: To avoid losing any information for this bus when returning to the previous pages to complete add information, complete the fields for the new bus and select the “Complete” and “Save” buttons.

6. **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 invoice. The number in this box should exactly match the expenses associated with this individual bus in the final invoice. Do not include ADA or shipping cost for the bus or charging infrastructure costs here. ADA cost or approved shipping cost must be on a standalone line item within the invoice, and infrastructure costs will be detailed later in the Form.

New Bus Information

<p>New Bus Owner ⓘ</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Org Name: Private Fleet Contact Name: [Redacted] × ▾</p> <p style="font-size: 0.8em; color: #0070c0;">This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.</p> </div> <p>New Bus Service Provider ⓘ</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Org Name: Not Applicable Contact Name: × ▾</p> <p style="font-size: 0.8em; color: #0070c0;">This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.</p> </div> <p>Proof of Delivery ⓘ</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Document #: 2 Document Name: delivery × ▾ Document Description: delivery</p> <p style="font-size: 0.8em; color: #0070c0;">This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.</p> </div> <p>Final Invoice ⓘ</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>Document #: 1 Document Name: Final Invoice × ▾ Document Description: invoice</p> <p style="font-size: 0.8em; color: #0070c0;">This field is mandatory to complete the Close Out Form but is not required to complete and save the bus information.</p> </div> <p>New Bus Dealer ⓘ</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<p>Bus Rebate Amount Received</p> <p>\$345,000.00</p> <p>Maximum Eligible Bus Rebate from Close Out Form ⓘ</p> <p>\$345,000.00</p> <p>New Bus Purchase Price ⓘ *</p> <div style="border: 1px solid #ccc; padding: 5px; width: 100%;"> <p>\$345,000.00</p> </div>
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7. Enter the 17-digit VIN for the bus delivered for **New Bus VIN***. Each bus should have a unique VIN. If two or more buses with the same VIN (either within this rebate or through another CSB funding program) are listed for replacement, a yellow warning banner will appear. If the duplicate VIN was entered in error, correct it; however, if the Form is submitted with a duplicate VIN, this will require resolution before the Form is accepted by the EPA.

New Bus VIN [?] *

000000000000000000

0 characters remaining.

Warning - Duplicate VIN Detected
A VIN has been detected that may have been used in this or other forms. It has been flagged for review.

New Bus Fuel Type [?]

Electric

New Bus GVWR [?] *

35,000 lbs

New Bus Delivery Date [?] *

10/29/2025

New Bus Delivery Date is the actual delivery date and differs from the new bus delivery date listed within the Bill of Lading (or other document)

New Bus Manufacturer [?] *

New Bus Model [?] *

Bus

New Bus EPA Vehicle Family [?]

AAAAA

New Bus Model Year [?] *

2025

8. **New Bus Fuel Type*** is prepopulated from the information in the Funding Request Form and cannot be changed after funds have been disbursed. If you change the New Bus Fuel Type when an existing bus is swapped, you will not be eligible for a higher rebate than what you received in the Payment Request form, but your **Maximum Eligible Bus Rebate from Close Out Form** may be reduced depending on what fuel type you select. A reduction in Maximum Eligible Bus Rebate from Close Out Form may require reimbursement of a portion of your rebate to the EPA.
9. **New Bus GVWR*** is prepopulated from the information in the Payment Request Form. The field is editable if changes are needed from what was submitted in the Payment Request Form. Changing the GVWR will not increase the **Maximum Eligible Bus Rebate from Close Out Form** but could decrease it if the GVWR is lowered. The **New Bus GVWR** must match the GVWR on the Final Invoice.
10. **New Bus Delivery Date***: Enter the delivery date for the new bus in format MM/DD/YYYY or use the calendar icon to select the date from the popup calendar.
 - a. **Note:** a date later than the date the Form is being completed cannot be entered. If the actual date differs from the bus delivery date listed on the proof of delivery document, check the box indicating that the date differs between actual date of delivery and proof of delivery. If the delivery date is past 05/29/2026, you should request an extension for submission of your Close Out form by using the Change Request form accessed through the applicant dashboard.

11. Select the **New Bus Manufacturer*** from the drop-down menu. The available options for selection in the menu depend on the New Bus Fuel Type selected. If the manufacturer of this bus does not appear, then select "Other" and enter the manufacturer name in the **New Bus Manufacturer (Other)** field.
12. **New Bus Model*** is prepopulated from the information in the Payment Request Form; however, the field is editable. Available selections are based on the New Bus Manufacturer selected. The New Bus Model must match the **New Bus Model** on the Final Invoice; however, if the model is not available in the menu selection, then select "Other" and enter the model in the **New Bus Model (Other)** field.
13. **New Bus EPA Vehicle Family** needs to be populated with the 12-character alphanumeric EPA Vehicle Family name or the 10-to-12-character CARB Executive Order ID.
 - a. To identify the EPA Vehicle Family, refer to the VECI label, which is usually on/near a door pillar or on the engine compartment sheet metal and should be used to report the EPA Vehicle Engine Family. Do not report any EPA Family Name information based on what is on an invoice.
 - i. **Note:** Vehicle Family information is also available at the EPA website but should *only* be used if the VECI label is missing on the new bus: visit the [Certification Data Spreadsheets page](#), download "Heavy-Duty Vehicle Certification Data (Model Years: 2015 – Present)," and search the spreadsheet for your bus model. The first letter of the EPA Vehicle Family represents the model year; see the EPA's [webpage on Vehicle Family naming](#) for a list of letters and model years.
 - b. If the bus is not an EPA-certified vehicle, enter the CARB Executive Order ID.
 - c. If the vehicle does not have EPA or CARB certification, contact the [Clean School Bus helpdesk](#).
14. **New Bus Model Year*** is prepopulated from the information in the Payment Request Form. If the new bus has changed, the field is editable. The model year must be between 2022 and 2030.
15. **Bus Shipping Costs***: This field will appear for buses serving school districts in Alaska, Hawaii, Puerto Rico, U.S. Virgin Islands, Guam, American Samoa, and the Commonwealth of the Northern Mariana Islands. If this field appears, enter the actual shipping costs for this bus based on the invoice document associated with this bus.
16. **ADA-Compliance Costs***: If the new bus is equipped with an ADA-compliant wheelchair lift, select the checkbox, which is only available if you requested an ADA-Compliance rebate for this bus in the Payment Request Form.
 - a. Then, enter the purchase price for equipping this bus with an ADA-compliant wheelchair lift. This number should exactly match the line item for the wheelchair lift in the final invoice and should not be included in New Bus Price field.
 - b. If you received a rebate for an ADA-Compliance wheelchair lift and did not install one on this bus, you will need to submit a reimbursement in the amount of the rebate received for the ADA-Compliance wheelchair lift. The EPA will provide information on how to reimburse the funds once you submit your Close Out Form.
17. The **Total Eligible ADA and Shipping Rebate** field displays the eligible rebate for ADA-Compliance and Shipping based on what was entered for this bus in the Close Out form. If this value is less than the rebate you received for these costs based on the Payment Request Form, a reimbursement to the EPA will be required.

18. **Reason for Change of Bus Information*** will appear if changes have been made to the new bus information provided in the Payment Request Form.

Please indicate in the field below why changes were made to this New Bus.

Reason For Change of Bus Information ⓘ *

Reason For Change of Bus Information is required

500 characters remaining.

The image shows a screenshot of a web form. At the top, there is a yellow background with the text 'Please indicate in the field below why changes were made to this New Bus.' Below this is a label 'Reason For Change of Bus Information' with a question mark icon and an asterisk. A red error message 'Reason For Change of Bus Information is required' is displayed below the label. A large, empty text input field with a blue border is positioned below the error message. In the bottom right corner of the input field, it says '500 characters remaining.'

19. **New Bus Estimated Annual Mileage*** requires you to enter the estimated annual miles the new bus will travel.
20. At this point, different fields will appear for the new buses depending on the new bus fuel type.
21. For electric new buses only:
- EV Battery Capacity*** is only visible if the new bus fuel type is electric. Enter the rated battery capacity of the bus in kilowatt hours (kWh).
 - The **Estimated EV Bus Range*** field requires you to enter the manufacturer's estimated range in miles for the new electric vehicle (EV) bus. This field is only visible if the new bus fuel type is electric. Estimated EV bus range may be identified in the Owner's Manual for the new bus.
 - Equipped with Auxiliary Heater?*** prompts you to select Yes or No from the drop-down menu. Select Yes if the new bus has an auxiliary heater.
 - Check the box for **Heater installed in accordance with the Program Guide*** if the auxiliary heater is installed in accordance with the [2023 Clean School Bus Rebates Program Guide](#).
 - Use the **Auxiliary Heater Externally Vented*** field to indicate whether the heater is vented to the outside of the bus.
 - 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.
 - Auxiliary Heater Fuel Type (Other)** is only visible if the auxiliary heater fuel type is "other."
 - Estimated Annual Idling Hours***: Enter the estimated annual idling hours for the new bus.
 - The **Capable of Bidirectional Charging*** field appears for electric buses and prompts you to select Yes or No from the drop-down menu. Select Yes if the bus is capable of two-way charging (e.g., grid-to-vehicle and vehicle-to-grid). Select 'no' if the bus can only receive energy and be charged by the electrical grid (grid-to-vehicle).
 - For **Battery Warranty Included**, select Yes if the bus purchase includes a battery warranty.

k. If the battery warranty covers a specific number of years, miles, or kWh of gross discharge throughput, enter information in these fields.

l. Attach a file or scan of **Battery Warranty Documents**.

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

m. Repeat steps i - k for the **Powertrain Warranty**.

22. For propane or CNG new buses only:

a. The **New Bus estimated fuel consumption (gallons)** field requires you to enter the estimated annual fuel consumption for this new propane (gallons) or CNG (pounds) bus. This field is only visible if the new bus fuel type is CNG or propane.

b. For **Powertrain Warranty Included**, select **Yes** if the bus purchase includes a powertrain warranty.

- i.** If the powertrain warranty covers a specific number of years or miles, enter information in these fields.
- ii.** Attach a file or scan of the powertrain warranty for the bus.

23. Photo of New Bus and VIN Documentation: Attach two photos for each new bus: a side view of the entire bus and a photo of the VIN plate. Include the last four digits of the VIN number in the file name.

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

b. Once you have completed the fields above, you must select the Complete button at the bottom of the page before moving on. You must fill out all required information for every bus in your fleet. Note: For the entered information to be "saved" you must either select the **Next** or **Save** buttons at the bottom of the page.

5.4 Complete Bus Information

Review the prepopulated fields in the “Bus Cost Totals” section before moving on. If any of the Bus Cost Totals are not accurate, review the information entered on the “Buses” page (page 6) and make edits where necessary.

1. **Number of Buses Requested** is prepopulated from the information in your rebate application.
2. **Number of Buses Ordered** is prepopulated from the information in your Payment Request Form.
3. **Number of Buses Received** is the total number of new buses entered on this Close Out Form.
4. **Total Bus Costs from Payment Request** is the sum of all the bus costs from the Payment Request Form.
5. **Total Bus Costs (Actual)** is the sum of the actual costs of all buses ordered based on information you entered on this Close Out Form.
6. **Total Bus Rebate Received** is the sum of all the bus rebate values for each bus ordered and does not include shipping of ADA-Compliance rebates.
7. Displayed if applicable: **Total Shipping Rebate Received** and **Total ADA Rebate Received** are the total rebates received for all buses that received shipping and ADA rebates.
8. Displayed if applicable: **Total Shipping Rebate Used (Actual)** and **Total ADA Rebate Used (Actual)** is the total eligible rebate based on the Close Out form for all buses that received shipping and ADA rebates.
9. Displayed if Applicable: **Total Shipping Costs (Actual)** and **Total ADA Costs (Actual)** are the total amounts you paid for shipping and ADA compliance for all buses.
10. Displayed if applicable: **Total Shipping Cost Responsibility** and **Total ADA Cost Responsibility** is the total selectee responsibility for shipping and ADA costs that exceeds the eligible rebate based on this Close Out form for all buses that received shipping or ADA rebates.

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

Bus Cost Totals			
1	Number of Buses Requested (Application) 2	2	
2	Number of Buses Ordered (Payment Request) 2	2	
3	Number of Buses Received (Close Out) 2	2	
4	Total Bus Costs from Payment Request	\$620,000.00	
5	Total Bus Costs (Actual)	\$620,000.00	
6	Total Bus Rebate Received	\$620,000.00	
7	Total Shipping Rebate Received	\$40,000.00	Total ADA Rebate Received \$20,000.00
8	Total Shipping Rebate Used (Actual)	\$30,000.00	Total ADA Rebate Used (Actual) \$20,000.00
9	Total Shipping Costs (Actual)	\$30,000.00	Total ADA Costs (Actual) \$20,000.00
10	Total Shipping Cost Responsibility	\$0.00	Total ADA Cost Responsibility \$0.00

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



6. Infrastructure Information

On this page, you will edit or enter information about the infrastructure purchased with rebate funding. Infrastructure items that were entered on your Payment Request Form will appear in the “Infrastructure Information” section, as shown in the screenshot below. Select **Edit** to check accuracy of entered data and complete any blank fields. All information entered should exactly match the infrastructure information included on the final infrastructure invoice. Select **+ Add Infrastructure** to add information for additional electric vehicle supply equipment (EVSE) or other eligible infrastructure costs (e.g., installation costs).

7 of 11 Infrastructure

Since you took delivery of an electric school bus(es), enter information about installed infrastructure and other infrastructure costs for this project (see Build America, Buy America Act (BABA) Implementation Procedures for EPA Office of Transportation and Air Quality Federal Financial Assistance Programs for items that should be part of project) that are eligible for a rebate on this page even if you don't plan to use rebate funds to cover costs of this infrastructure. On the Funding page you will be able to allocate eligible rebate funds you received to buses and/or infrastructure you listed on this page.

Note: The term EVSE on this page means “electric vehicle supply equipment (charger)”.

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

- EVSE information (type, manufacturer, model, maximum output power, date of manufacture, number of plugs, bidirectional charging capability, and Energy Star compliance if Level 2 charger)
- All costs associated with EVSE installation
- Other eligible infrastructure costs (type, description of work)
- Infrastructure installer and owner (applicant, school district or entered on Organizations page)
- Proof of delivery documents for each installed EVSE (selected from information entered on Documents page)
- Final invoice documents for each installed EVSE and other eligible infrastructure costs (selected from information entered on Documents page)
- Infrastructure supplier organization (populated from entered information on Organizations page and selections made on Documents page)
- Address where EVSE or other eligible infrastructure was installed
- Photo of each installed EVSE
- Photo of charging equipment serial number

* 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.

	Infra. Number 1	Infra. Type: Level 2 Charger Manufacturer: ChargePoint Model: 1234	Quantity: 2 Cost (per item): \$1,234 Subtotal: \$2,468.00	
---	---------------------------	---	--	---

 **Infrastructure Information Incomplete**
Click the "Edit" button for this row, and complete all required fields.



[Return to Organization Entry](#) [Return to Document Entry](#)

6.1 Add Infrastructure—Level 2/Direct Current (DC) Fast Chargers

In this section, you will enter information for each type of EVSE that was purchased with rebate funding. Enter the cost of installation and any necessary electrical/construction work as a separate item. If you do not have a breakdown of installation and EVSE cost, enter the full amount in **Infrastructure Cost per Charger**.

Note that **each infrastructure line item cost must match exactly the amount on the infrastructure invoice**. You must either: a) include each line item in the Close Out Form as it appears on invoice, or b) split the cost of a line item that served multiple chargers such that the whole cost is included across the line items on your Close Out Form (i.e., divide the invoice line item by the number of chargers and include the result in each charger line item on the Close Out Form).

Once you select **+ Add Infrastructure**, select the infrastructure type from the drop-down menu. For Level 2 chargers and DC fast chargers, you will see the following fields:

Infrastructure #
1

Infrastructure Information

Infrastructure Type [?] *	Level 2 Charger
EVSE Maximum Output Power (kW) [?] *	12
EVSE Manufacturer [?] *	ChargePoint
EVSE Model [?] *	1234
EVSE Date of Manufacture *	10/31/2025
EVSE Date of Installation *	11/10/2025
Number of Plugs on EVSE [?] *	2
<input type="checkbox"/> EVSE Capable of Bidirectional Charging? [?]	
<input checked="" type="checkbox"/> This Charger Is Energy Star Compliant [?] *	
<input checked="" type="checkbox"/> This Charger or Infrastructure Materials Is Buy America Compliant [?]	
Infrastructure Installer [?]	
Infrastructure Owner [?]	
Electrification as a Service (EaaS provider) [?]	

Infrastructure Cost Summary:

Infrastructure Quantity [?] *	2
Infrastructure Cost per Charger [?] *	\$1,234.00
Total Taxes and Other Fees *	\$0.00
Infrastructure Subtotal [?]	\$2,468.00
Total Cost Listed on Invoice [?] *	\$2,468.00

Cost Includes Installation [?]

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

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

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

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, or Other Eligible Infrastructure Costs**.
2. **EVSE Maximum Output Power (kW)*** requires you to enter the rated maximum output power of the charger (in kilowatts). The kilowatts (kW) for a Level 2 Charger should not be higher than 20 kW and for a DC Fast Charger the kilowatts should not be less than 20 kW.
3. **Infrastructure Quantity*** needs to be populated with the number of chargers purchased of that charger type that had the same cost per charger. If multiple types of chargers were purchased, or chargers of the same type have different costs, each must be entered separately.
4. Enter the unit cost for each charger (plus installations costs if cannot be reported separately) in the **Infrastructure Cost per Charger** field. Enter the unit cost for each charger (plus installations costs if not reported separately). Cost should not include taxes and other fees. Enter any taxes and other fees in the Total Taxes and Other Fees field.
5. Select the **EVSE Manufacturer*** from the drop-down menu. If the manufacturer is not listed, select **Other** and enter the manufacturer in the **EVSE Manufacturer (Other)** field below.
6. Enter the price per charger in the **Infrastructure Cost Per Charger*** field. This price should exactly match the cost per charger on the final infrastructure invoice.
7. The **EVSE Model*** is the model of the infrastructure hardware purchased.
8. Enter the **Total Taxes and Other Fees*** in this field if they are listed separately on the invoice.
9. Select the **EVSE Date of Manufacture*** from the drop-down calendar, or by entering the date in the following month, day, year format, MM/DD/YYYY.
10. The **Infrastructure Subtotal** field is read only and displays the subtotal for each infrastructure line item.
11. Select the **EVSE Date of Installation*** from the calendar or by entering the date in the following month, day, year format: MM/DD/YYYY.
12. Enter the **Total Cost Listed on Invoice*** that is the sum of all equipment costs, fees, and taxes associated with this infrastructure item. If the value in this field does not match the value in the Infrastructure Subtotal field, a warning message will appear asking you to resolve the difference. If the difference in values cannot be resolved, it will require additional EPA review but will not prevent you from submitting the Close Out form.
13. The **Cost Includes Installation** box should be selected if the infrastructure cost per charger includes installation.
14. Enter the number of plugs per charger in the **Number of Plugs on EVSE*** field.
15. **EVSE Capable of Bidirectional Charging?** Check this box if the charger is capable of vehicle-to-grid charging (i.e., the EVSE can both receive energy and provide energy).
16. **Planning to Use Bidirectional Charging?** checkbox appears if your EVSE is capable of bidirectional charging, and you plan to use vehicle-to-grid charging.

- 17. This Charger is Energy Star Compliant:** Check this box to certify that the infrastructure is Energy Star certified for Level 2 chargers. All Level 2 chargers must be Energy Star Compliant.
- 18. This Charger or Infrastructure Material Is Build America, Buy America Compliant:** Check this box to certify that this infrastructure meets the Build America, Buy America program requirements outlined in the [2023 Clean School Bus Rebates Program Guide](#).
- 19.** Select the **Infrastructure Installer** from the drop-down menu. If you do not see the organization in the menu, return to the “Organizations” page (see **Return to Organization Entry** button), enter the organization and then return to this field to select the organization from the menu.
- 20.** Select the **Infrastructure Owner** from the drop-down menu. If the name does not appear on the list, select the **Return to Organization Entry** button to enter the owner’s information.
- 21.** Select the **Electrification as a Service (EaaS provider)** (if applicable) from the drop-down menu. If the name does not appear on the list, select the **Return to Organization Entry** button to enter the EaaS provider’s information.

Note: If a single invoice lists multiple infrastructure items, the total tax needs to be apportioned for each piece of equipment or installation charge.

Next, add the **address where the EVSE was installed**.

In the “Documents and Photos” section, add the final invoice and proof of delivery documents using the drop-down menus. If you do not see the documents required, select **Return to Document Entry** to add them. Note: The **Infrastructure Vendor** field is auto filled when you select the Final Invoice document above.

Finally, upload an image of the charging equipment after installation.

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

Minimum file size: 1KB

Maximum file size: 5MB

Once the required information is entered, select Complete.

6.2 Add Infrastructure—Other Eligible Infrastructure Costs

To enter information on non-EVSE infrastructure costs such as construction materials, design, permitting, and labor, select Other Eligible Infrastructure Costs from the **Infrastructure Type** drop-down menu. Only include infrastructure items that were purchased with Clean School Bus rebate funding. The data fields associated with these costs are shown below, with required fields marked with an asterisk.

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.

Infrastructure # 1

Infrastructure Information

Infrastructure Type *
Other Eligible Infrastructure Costs

Infrastructure Type (Other) *
Infrastructure Materials Only (e.g. wiring, panels, conduit)

Description of Work *
infrastructure material cost
472 characters remaining.

Other Eligible Infrastructure Cost *
\$30,000.00

Total Taxes and Other Fees *
\$0.00

Infrastructure Subtotal *
\$30,000.00

Total Cost Listed on Invoice *
\$30,000.00

This Charger or Infrastructure Materials Is Buy America Compliant

Infrastructure Installer *
Org Name: Infrastructure Dealer | Contact Name: [Redacted]
This field is mandatory to complete the Close Out Form but is not required to complete and save the infrastructure information.

Infrastructure Owner *
Org Name: Infrastructure Dealer | Contact Name: [Redacted]
This field is mandatory to complete the Close Out Form but is not required to complete and save the infrastructure information.

Electrification as a Service (EaaS provider) *
Org Name: Not Applicable | Contact Name:
This field is mandatory to complete the Close Out Form but is not required to complete and save the infrastructure information.

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**.
2. Select the **Infrastructure Type (Other)*** from one of the following categories: Infrastructure Materials Only; Infrastructure Materials, Design, Labor and Permitting etc.; Infrastructure Design, Labor and Permitting etc. Only (no materials). If your other infrastructure costs fit into more than one of the categories, you'll need to enter multiple line items.
3. For the **Description of Work***, provide a detailed description of the infrastructure-related work entered in the **Other Eligible Infrastructure Cost** field.

4. **Other Eligible Infrastructure Cost*** must be populated with the total of all other eligible infrastructure costs, including materials, design, labor, and permitting for this line item. Do not include taxes and other fees in the value entered as this will be entered in the field below.
5. Enter the **Total Taxes and Other Fees*** if they are delineated separately in the invoice (if applicable).
6. The **Infrastructure Subtotal** field is read only and displays the subtotal for each infrastructure line item.
7. **Total Cost Listed on Invoice*** is the sum of other eligible infrastructure costs, taxes, and fees. A warning will appear if the entered cost does not match the total listed in the Infrastructure Subtotal field. The Form will ask you to fix discrepancies; however, if differences cannot be resolved, you can continue the Form, but the information will require additional review.

Next, select the **Infrastructure Installer**, **Infrastructure Owner**, and if applicable, **Electrification as a Service (EaaS Provider)** from the drop-down menus in these fields. If you do not see the organizations needed, select **Return to Organization Entry** to add them.

Then add the address where the other eligible infrastructure is installed. The address will be prepopulated with the previous address entered for other infrastructure line items but can be edited if needed.

Finally, add a final invoice for the associated cost using the drop-down menu. If you do not see the document required, select **Return to Document Entry** to add it. Note: The **Infrastructure Vendor** field is auto filled when you select the Final Invoice document above.

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

You can add another infrastructure item by selecting **+ Add Infrastructure** at the bottom of the Infrastructure Information section on the page. You may add as many infrastructure items as needed and delete or edit them at any time.

The "Infrastructure Totals" section at the bottom of the page shows the infrastructure totals from the Payment Request Form and the Close Out Form (listed as "Actual" at the end of the field name) broken out by infrastructure type. Select **Next** to proceed to the "Funding" page.

Infrastructure Totals			
Level 2 Charger Costs from Payment Request	\$2,468.00	Level 2 Charger Costs (Actual) ?	\$2,468.00
DC Fast Charger Costs from Payment Request	\$0.00	DC Fast Charger Costs (Actual) ?	\$0.00
Other Infrastructure Costs from Payment Request	\$0.00	Other Infrastructure Costs (Actual) ?	\$0.00
<hr/>			
Total Infrastructure Costs from Payment Request ?	\$2,468.00	Total Infrastructure Costs (Actual) ?	\$2,468.00
Total Infrastructure Rebate Received ?	\$2,468.00		

7. Funding Information

On this page, you will allocate your awarded CSB rebate funds to each bus and to infrastructure based on the total eligible rebate for bus and infrastructure identified on the “Buses” page. The eligible ADA and shipping rebates were determined on the “Buses” page and are not part of the allocations on this page; however, they are shown in the bus funding allocation section for information only.

7.1 Bus Funding Allocations

Select **Edit** for each listed bus to allocate funding to each bus. The screenshot below shows the **Edit** button for Bus 1 and the fields that appear once the **Edit** button is selected for Bus 2.

The screenshot displays the "Bus Funding Allocations" interface. At the top, there is a table with columns for "Bus #", "Existing Bus VIN", "Existing Bus Fuel Type", and "New Bus Fuel Type". The first row shows "Bus 1" with VIN "111111111111111111", "Existing Bus Fuel Type: Diesel", and "New Bus Fuel Type: Electric". A red arrow points to the "Edit" button next to this row. Below the table, the "Edit" form for Bus 2 is shown. It includes fields for "Bus #", "Existing Bus VIN", "Existing Bus Fuel Type", and "New Bus Fuel Type". A red arrow points to the "Complete" button at the bottom of the form. The form also displays various rebate amounts and a "Funding Allocation for This Bus" field with a value of \$300,000.00. At the bottom of the form, there is a summary table with the following data:

Total Bus Rebate Received from Payment Request	\$620,000.00	Rebate Amount Allocated to All Buses	\$620,000.00
Total Eligible Bus Rebate Amount in Close Out	\$620,000.00	Total Remaining Rebate Amount for All Buses	\$0.00
Total Bus Costs	\$620,000.00		

For the Funding Allocation for This Bus*, enter the amount of rebate funding that you want to allocate to this bus. The amount entered cannot be more than the **New Bus Purchase Price** or the **Bus Rebate Amount Received**, whichever is less. For electric buses, any remaining unallocated rebate funding for this bus will be available for eligible infrastructure costs.

The amounts at the bottom of this box show the following:

- The **Total Bus Rebate Received from Payment Request**, which is the amount of rebate funding received based on the Payment Request form.
- The **Total Eligible Bus Rebate Amount in Close Out**, which is the maximum that can be allocated to all buses and is *either* the sum of the “New Bus Purchase Price” for each bus included in the Close Out Form, *or* the amount listed in the “Total Rebate Amount Received” which ever field is a lower amount.
- The **Rebate Amount Allocated to All Buses**, which is the sum of all the allocations for each bus included in the Close Out Form.
- The **Total Remaining Rebate Amount for All Buses**, which is the funding (if any) available to allocate to remaining buses listed in the Close Out Form (i.e., buses for which you have not yet entered funding allocations) or any infrastructure associated with those buses.

The **Total Bus Reimbursement Owed to EPA from Bus Exclusions and Rebate Reductions** field will appear at the bottom of the Bus Funding Allocations section due to the following changes on the “Buses” page:

- Bus(es) were excluded on the “Buses” page and a reimbursement of the amount of rebate paid for that bus(es) is/are needed.
- A reduction in the GVWR that reduces the maximum eligible bus(es) rebate for a bus to below the rebate received for bus(es). The difference between the maximum rebate amount for the bus with the new GVWR and the rebate paid for the bus(es) must be reimbursed to the EPA.

Total Bus Rebate Received from Payment Request	Rebate Amount Allocated to All Buses
\$920,000.00	\$610,000.00
Total Eligible Bus Rebate Amount in Close Out ⓘ	Total Remaining Rebate Amount for All Buses
\$610,000.00	\$0.00
Total Bus Costs	
\$764,000.00	

Warning - Rebate Amount Refund Required

The bus exclusions provided on this form indicate that you are eligible for less rebate funding than the rebate amount you were paid based on the approved Payment Request Form. Additional actions will be necessary after submittal and review of the Close Out Form to settle this balance.

Total Bus Reimbursement Owed to EPA from Bus Exclusions and Rebate Reductions ⓘ	\$345,000.00
Total Bus Reimbursement Owed to EPA from Bus Funding Allocations	\$0.00

Any non-EPA funding that was received for buses must be entered in the next section. This includes any funding provided by the applicant organization or school district. Select **+ Add Funding**, then enter each non-EPA funding source separately. Select the type of funding source¹, enter the name of the funding source, and enter the total amount from that funding source. When finished, select **Complete**.

Non-EPA Clean School Bus Funding Information

Enter all sources of non-EPA funding that were used to purchase new bus(es).

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

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

Complete Cancel

+ Add Funding

Total Non-Program Funding Acquired ⓘ
 \$0.00

Non-EPA Bus Funding Not Accounted For ⓘ
 \$0.00

When all non-EPA funding sources and amounts are added, check that the **Non-EPA Bus Funding Not Accounted For** amount is \$0.00. If it is not, a warning message will appear. If the amount is a negative value, the warning will state that the funding amount exceeds the bus and infrastructure costs, and you may owe reimbursement to the EPA. If the value is a positive amount, the warning will state that you have insufficient funds to cover the costs of your buses.

7.2 Infrastructure Award Allocations

In the “Infrastructure Award Allocations” section, enter the rebate amount you would like to allocate to infrastructure in the **Funding Allocation for All Eligible Infrastructure Costs** field. You cannot allocate more than either the **Unallocated Bus Rebate Eligible for Infrastructure** *OR* **Total Eligible Infrastructure Costs** fields, whichever value is less. Any unallocated funds will reduce the amount of your rebate and will result in a reimbursement owed to EPA for the unallocated funds.

Infrastructure Award Allocations

Infra.	Infra. Type: Level 2 Charger Manufacturer: Volkswagen Model: 1234	Quantity: 2 Cost (per item): \$1,234 Subtotal: \$2,468.00
---------------	--	--

Unallocated Bus Rebate Eligible for Infrastructure ⓘ
 \$245,000.00

Total Eligible Infrastructure Costs ⓘ
 \$2,468.00

Funding Allocation for All Eligible Infrastructure Costs ⓘ *

1 The proposed replacement bus and any associated charging infrastructure to be paid for in part by CSB funds must not also be funded by other federal funds. Fleets can use external non-federal funding sources as part of their bus replacement project but must confirm with the source of those funds that they are not pass-through federal funds. Volkswagen Environmental Mitigation Trust Funds may be used as external funds provided that the VW trust funds are associated with Eligible Mitigation Action (EMA) #2. VW trust funds under EMA #10, the DERA Option, are not eligible external funds.

Next, add all sources of non-EPA funding that were used to purchase or construct infrastructure to support electric buses. This includes any funding provided by the applicant organization or school district. Check that the **Non-EPA Infrastructure Funding Not Accounted For** amount is \$0.00. If it is not, a warning message will appear. If the **Non-EPA Infrastructure Funding Not Accounted For** amount is a negative value, the warning will state that the funding amount exceeds the bus and infrastructure costs, and you may owe a reimbursement to the EPA. If the value is a positive amount, the warning will state that you have insufficient funds to cover the costs of your infrastructure (if purchasing electric buses). You may continue submitting the Close Out Form despite the warning that you have insufficient funds to cover the costs of your buses, but you are encouraged to include any non-EPA funding to cover eligible project costs.

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.

Non-EPA Funding Type ⓘ *

Source of Additional Non-EPA Funding ⓘ *

Non-EPA Funding Amount ⓘ *

Complete
Cancel

+ Add Funding

Total Infrastructure Non-EPA Funding Acquired ⓘ

\$0.00

Non-EPA Infrastructure Funding Not Accounted For ⓘ

\$0.00

Interest Earned on CSB Rebate: all interest earned on CSB Rebate funding must be returned to the EPA. CSB Rebate selectees will need to confirm whether CSB Rebate funding did or did not earn interest. If interest was earned, instructions on how to return earned interest will be sent during the review process.

Interest Earned on Rebate

Interest was Earned on Rebate Funds Received ⓘ *

No ⌵

The amount of any reimbursement for infrastructure costs will be displayed in the **Infrastructure Reimbursement Owed to EPA** field. The reimbursement due is the sum of any unallocated bus rebate that is eligible for infrastructure and any excessive non-EPA funding for infrastructure.

ⓘ Warning - Rebate Amount Refund Required

The infrastructure cost totals provided are either less than the infrastructure awarded amounts, and/or the non-EPA funding plus infrastructure rebate exceeded the infrastructure project costs. Additional actions will be necessary after submitting the Close Out Form to settle this balance.

Infrastructure Reimbursement Owed to EPA from Bus Exclusions and Rebate Reductions ⓘ	\$0.00
Infrastructure Reimbursement Owed to EPA ⓘ	\$242,532.00

The following fields will appear at the bottom of the “Funding” page if a reimbursement is due to the EPA.

The **Total Bus ADA and Shipping Reimbursement Owed** is the reimbursement needed for ADA and shipping calculated on the "Buses" page.

The **Total Bus and Infrastructure Rebate Owed to EPA** is the total reimbursement owed to the EPA and includes the sum of all reimbursements calculated on the Bus and Funding pages (see screenshot below).

Total Reimbursement Owed to EPA is the sum of the **Total Bus ADA and Shipping Reimbursement Owed** and the **Total Bus and Infrastructure Reimbursement Owed to EPA**.

Select **Next** to move forward.

Warning - Rebate Amount Refund Required
The actual eligible rebate totals calculated from costs you provided on this form are less than the sum of the paid rebate amount and any additional Non-EPA funding you received. Additional actions will be necessary after submittal and review of the Close Out Form to settle this balance.

Total Bus ADA and Shipping Reimbursement Owed	\$15,000.00
Total Bus and Infrastructure Rebate Owed to EPA	\$242,532.00
Total Reimbursement Owed to EPA	\$257,532.00

8. Build America, Buy America Compliance

On this page you will confirm whether the infrastructure for this rebate project is Build America, Buy America Act (BABA) compliant with additional attestation. All infrastructure for this project – including materials identified on the “Infrastructure” page as well as other infrastructure that the EPA is not funding – must meet BABA requirements.

The EPA interprets a “project” covered by BABA as consisting of any activity relating to the construction, alteration, maintenance, repair of infrastructure and associated activities necessary to complete the work regardless of the number of contracts or assistance agreements involved so long as all the contracts and assistance agreements awarded are closely related in purpose, time, and place (PTP test).

See FAQ Q2.3 and Q2.4 in [OTAQ’s BABA Implementation Procedures document](#) for more information on the definition of “project” and using the “Purpose, Time, and Place” test to determine project scope. See also Q2.12 and Q2.13 for more discussion of the applicability of BABA to fueling infrastructure purchased with non-federal funding.

For additional information on BABA to inform you of your responses to the questions, please refer to documents linked below:

- *Revised FAQ 3.34 in [2023 CSB Rebate Program supplemental questions and answers](#), for infrastructure purchasing that was initiated before August 8, 2025.*
- [OTAQ’s BABA Implementation Procedures document](#)
- [General Applicability Waivers](#)
- For additional questions on BABA contact cleanschoolbus@epa.gov or BABA-OTAQ@epa.gov.

As described in detail on the signature page of this Close Out Form, your responses below are a material representation to the EPA as complete and accurate information. The EPA, the Agency’s authorized representatives, and/or the Office of Inspector General will conduct random reviews of selectees to verify information provided below and protect against waste, fraud, and abuse.

Select the appropriate option from the **Is Infrastructure used in this project BABA compliant?** drop-down menu. The menu options are the following:

- Yes, all project infrastructure meets BABA requirements, including non-EPA funded infrastructure for which the purchasing process was initiated after August 8, 2025.
- Yes, I am using a BABA waiver for some or all project infrastructure

If you used a waiver, you must select which type(s) of waiver(s) you used from the list of approved general applicability BABA waivers and/or select “Approved Project-Specific Waiver.” Choosing an Approved Project-Specific Waiver will open two additional fields that must be completed, **Project-Specific Waiver Name**, and **Date Approved**. The [Approved Waivers](#) link takes you to an EPA webpage that lists all the BABA waivers approved by the EPA.

- No, BABA does not apply to this project

Selecting this option requires you to attest to one of two options to the following field **“Based on the guidance you reviewed above regarding the definition of project and the Purpose, Time, and Place (PTP) test, attest to one of the following.”** The options are the following:

- The purchasing process for the charging or other fueling infrastructure was initiated prior to August 8, 2025, and was not funded through the CSB rebate.
- Fueling infrastructure for the EPA-funded buses is not part of the same project as the EPA-funded buses based on the PTP test

Select **Next** when you are finished entering the BABA information.

9 of 11 Build America, Buy America Compliance

On this page, you will confirm whether the infrastructure for this rebate project is Build America Buy America Act (BABA) compliant with additional attestation. All infrastructure for this project - including materials identified on the "Infrastructure" page as well as other infrastructure that EPA is not funding - must meet BABA requirements.

The EPA interprets a "project" covered by BABA as consisting of any activity relating to the construction, alteration, maintenance, repair of infrastructure and associated activities necessary to complete the work regardless of the number of contracts or assistance agreements involved so long as all the contracts and assistance agreements awarded are closely related in purpose, time, and place (PTP test).

Note when infrastructure is part of the same project funded by CSB, BABA applies to the infrastructure even if federal funding is not used for the infrastructure. See FAQ Q2.3 and Q2.4 in [OTAQ's BABA Implementation Procedures document](#) for more information on the definition of "project" and using the "Purpose, Time, and Place" (PTP) test to determine project scope. See also Q2.12 and Q2.13 for more discussion of the applicability of BABA to fueling infrastructure purchased with non-federal funding.

For additional information on BABA to inform your responses to the questions, please refer to documents listed below:

- Revised FAQ 3.34 in [2023 CSB Rebate Program supplemental questions and answers](#), for infrastructure purchasing that was initiated before August 8, 2025.
- [OTAQ's BABA Implementation Procedures document](#).
- [General Applicability Waivers](#).
- For additional questions on BABA contact cleanschoolbus@epa.gov, or BABA-OTAQ@epa.gov.

As described in detail on the signature page of this Close Out Form, your responses below are a material representation to the EPA as complete and accurate information. The EPA, the Agency's authorized representatives, and/or the Office of Inspector General will conduct random reviews of selectees to verify information provided below and protect against waste, fraud, and abuse.

* denotes required field

BABA Compliance

Is the infrastructure used in this project BABA-compliant? ⓘ *

No, BABA does not apply to this project

Based on the guidance you reviewed above regarding the definition of project and the PTP test, attest to one of the following: *

The purchasing process for the charging or other fueling infrastructure was initiated prior to August 8, 2025 and was not funded through the CSB rebate

Fueling infrastructure for the EPA-funded buses is not part of the same project as the EPA-funded buses based on the Purpose, Time, and Place test

9. Telematics

10 of 11 Telematics

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.

If you are willing to share your telematics-related information with the EPA, select the check box. Next, select the appropriate contact. If you would like to provide separate contact information from your primary or alternate contact and that contact is not available in the drop-down menu, return to the "Organizations" page to enter a telematics contact, and then return to this page to select the Telematics Contact.

Select **Next** to proceed.

10. Signature

Review the summary cost, rebate received, and rebate used information provided at the top of the page before you sign the Close Out Form.

11 of 11 Signature

* denotes required field

Summary	
Total Bus Costs (Actual) \$411,111.00	Total Combined Costs ? \$413,579.00
Total Infrastructure Costs (Actual) \$2,468.00	Total Applicant Responsibility ? \$0
Rebate Received	Rebate Used
Total Bus Rebate Received \$141,111.00	Total Bus Rebate Used (Actual) \$130,000.00
Total Infrastructure Rebate Received \$2,468.00	Total Infrastructure Rebate Used (Actual) \$2,468.00
Total Combined Rebate Received \$143,579.00	Total Combined Rebate Used (Actual) \$132,468.00

The **Name** and **Title** fields on this page are prepopulated for the authorized representative name from the person who initiated the Form using SAM.gov point of contact information. 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 form, then notify the authorized representative so they can 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 page to show their full name and title before signing and submitting.

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

To complete your Close Out Form, you must read and agree to the numbered list under "Signature and Certification," sign, confirm signature, and select **Submit Form**.

Name *

Name is required

Title *

MANAGER

Electronic Signature of Authorized Representative *



*

Sign above

I confirm I have provided my signature above *



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

10.1 Missing Document or Organization Information

If any information is missing, a warning will pop up on the "Signature" page indicating what is missing. 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 submit all missing information, go back and sign and submit the Close Out Form.

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 *

Bus Information

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

- BUS #1** Scrap Yard Organization, Transportation Service Provider (TSP), New Bus Final Invoice
- BUS #2** Existing Bus Owner, Scrap Yard Organization, Transportation Service Provider (TSP), New Bus Final Invoice

[Back to Bus Information Entry](#)

All Infrastructure Information Complete *

Infrastructure Information

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

- INFRASTRUCTURE #1** Electrification as a Service (EaaS provider), Final Invoice, Proof of Delivery

[Back to Infrastructure Information Entry](#)

11. Next Steps

The EPA will conduct a thorough review of your Close Out Form submission for completeness and accuracy. We will follow up with questions as needed. After Close Out Form submission, please monitor your email for any requests for edits from the EPA, with the expectation to respond to these requests within three business days. Submission of the Close Out Form does not constitute the end of project compliance, as you will need to ensure that all requests for edits are addressed, and documentation is retained in the event of a site visit. Please refer to the Terms and Conditions in the [2023 CSB Program Guide](#) for details on requirements throughout the duration of your CSB project.

Appendix A: Glossary

This appendix defines terms and abbreviations used throughout the Close Out Form and system pages.

“Your Rebate Forms” Page

- **Rebate ID:** Unique six-digit ID assigned by the EPA to each rebate request.
- **Form Type:** Application, Payment Request, or Close Out.
- **Form Status:** Draft, submitted, or funding approved.
- **UEI:** Unique entity ID from SAM.gov.
- **EFT Indicator:** Electronic funds transfer indicator for the associated bank account from SAM.gov.
- **Applicant:** Legal business name from SAM.gov for this UEI.
- **School District:** School district served by the new buses for the next five years.
- **Updated By:** Last person to update the Form.
- **Date Updated:** Last date this form was updated.
- **Change Request:** The Change Request Form allows you to edit, extend, or withdraw a form depending on its status.

“Applicant Info” Page

- **Total Rebate Funds Requested in Application:** This field is prepopulated with the funding amount you requested in your Application Form.
- **Total Rebate Funds Received from Payment Request:** This field is prepopulated with the funding amount you received according to your Payment Request Form.
- **Applicant Organization Name:** Your applicant organization’s SAM.gov name is prepopulated, based on the organization you entered on your Application Form.
- **Unique Entity Identifier (UEI):** This is your applicant organization’s SAM.gov UEI, prepopulated based on the organization you chose when starting your application.
- **Electronic Funds Transfer (EFT) Indicator:** This is your SAM.gov EFT indicator, prepopulated based on the organization you chose when starting your application.
- **Physical Street Address, City, State, Zip Code:** These address fields are prepopulated from your SAM.gov registration and Application Form.
- **Organization County:** The county where the applicant organization is located is an editable field.
- **Applicant Primary Contact:** Review the primary contact information for the applicant. The primary contact may or may not be someone different from the applicant organization SAM.gov point of contact. Edit the primary contact information if there are any errors.
- **Update Primary Contact:** Checking this box will allow you to update any primary contact fields.
- **Replace Primary Contact:** Checking this box will delete all the existing primary contact entries, allowing you to add a new primary contact.

- **Applicant Alternate Contact:** If applicable, review the alternate contact for the applicant. The alternate contact may or may not be someone different from the applicant organization POC. Edit the alternate contact information if there are any errors.
- **Clear Alternate Contact Information:** This button can be used to delete all alternate contact fields.

“School District Info” Page

- **National Center for Education Statistics (NCES) District ID:** The NCES District ID was imported into this form from your application and is not editable. This is the school district that the new buses will serve for the next five years. If you do not have an NCES District ID, contact the help desk at cleanschoolbus@epa.gov.
- **School District Name and Address:** The name and physical address of the school district that the new buses will serve.
- **Prioritized:** Read-only field, filled with Yes or No based on whether the school district meets prioritization criteria.
- **Priority Reason:** The reason(s) for which your school meets the prioritization criteria.
- **Are you self-certifying as prioritized?:** If self-certification is applicable, this field will display the self-certification category from the Payment Request Form.
- **School District Contact Information:** Review the school district contact person’s information. The school district contact may be someone different from the primary (or alternate) applicant contact. Edit the school district contact information if there are any errors.
- **Update School District Contact:** Checking this box will allow you to update any school district contact fields.
- **Replace School District Contact:** Checking this box will delete the existing district contact entries, allowing you to add a new school district contact.

“Organizations” Page

- **Organization Type:** Check the boxes for all types that apply to your organization:
 - **Scrap Yard (existing bus):** Any organization that scrapped an existing bus.
 - **Donee (existing bus):** Any organization that received a donated existing bus from the applicant.
 - **Purchaser (existing bus):** Any organization that purchased an existing bus from the applicant.
 - **Existing Bus Owner:** All existing bus owners that are not the applicant, or the public school district or public charter school that the new buses will serve.
 - **New Bus Owner:** All new bus owners (e.g., school district, nonprofit, private fleet, Tribe) that are not the applicant, or the public school district or public charter school that the new buses will serve.
 - **Private Fleet (existing or new buses):** Any private fleet that is not owned by the applicant. A school district that contracts out bus service to multiple private fleets may only submit one application but may list multiple private fleets on the application.
 - **New Bus Dealer:** The vendor or dealer that the new bus owner will purchase the bus from.
 - **New Bus Service Provider:** Any organization that is paid by the selectee or school district to provide fleet services including bus operation, management or total bus management and is not otherwise listed in the Close Out Form.

- **Infrastructure Owner (electric bus charging):** All infrastructure owners (e.g., school district, private fleet) of the electric bus charging equipment. If the infrastructure owner is the applicant, the school district that the new buses will serve, or a private fleet entered in your application, then you do not have to enter new infrastructure owner information as it is already included within this form.
- **Infrastructure Supplier (charging equipment only):** All infrastructure suppliers from which charging equipment was purchased (includes the installer of the infrastructure charging equipment when they are also the charging equipment supplier).
- **Infrastructure Installer:** The organization that installed the charging equipment.
- **Electrification as a Service (EaaS) Provider:** Any organization that is paid by the selectee or school district to manage charging infrastructure and is not otherwise listed in the Close Out Form.
- **Other Infrastructure Organization:** All other eligible infrastructure organizations (e.g., organizations that perform trenching and wiring or project management; does not include the charger installer if the charger is installed by the infrastructure charging equipment supplier).
- **Telematics Contact:** The organization responsible for supplying bus telematics data.
- **Organization Name:** Name of the organization.
- **Address:** Address of the organization including city, state, county, and zip code.
- **Contact Information:** First and last name, title, business email, and business phone number of the organization’s contact.
- **Update Organization Contact:** Checking this box will allow you to update any organization contact fields.
- **Replace Organization Contact:** Checking this box will delete all of the existing organization contact entries, allowing you to add a new organization contact.

“Documents” Page

- **Document Name:** A unique name for the document that will be used to reference this document within the form. Required documents include final invoices and proof of delivery (for example, a bill of lading).
- **Document Description:** This optional field can be used to enter any additional information about the document and is limited to 250 characters.
- **Document Purpose (Choose all that apply):** Indicate which of the following categories the document applies to.
 - **New Bus:** The replacement bus.
 - **Electric Bus Charging Equipment:** Charging equipment for the replacement bus.
 - **Other Infrastructure Installation Costs:** Other infrastructure costs for the replacement bus (e.g., wiring, conduit, labor, project management).
- **Document Type:** Select either **Final Invoice** or **Proof of Delivery**.
- **Apply [Final Invoice/Proof of Delivery] to All Buses:** Select this button if the document applies to all buses purchased with rebate funds.

- **Apply [Final Invoice/Proof of Delivery] to all charging infrastructure:** Select this button if the document applies to all the infrastructure purchased with rebate funds.
- **Apply Final Invoice to all other infrastructure:** Select this button if the final invoice applies to all the other infrastructure costs purchased with rebate funds.
- **Associated Purchaser:** The purchaser of buses or infrastructure that is named in this document. The associated purchaser can be an applicant organization, school district, existing bus owner, new bus owner, private fleet, or infrastructure owner on the “Organizations” page.
- **Associated Vendor:** The vendor of buses or infrastructure that is named in this document. The associated vendor can be an applicant organization, new bus dealer, private fleet, infrastructure supplier, infrastructure installer, or other infrastructure organization on the “Organizations” page.
- **Document Upload:** Attach a file or scan of the relevant document.
 - Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
 - Minimum file size: 1KB
 - Maximum file size: 5MB

“Buses” Page

- **Number of School Buses in Current Fleet:** Total number of buses (of all types) in the current fleet.
- **Number of Electric School Buses in Current Fleet:** Total number of electric buses in the current fleet.
- **Swap Existing Bus:** Select this box if an existing bus provided in the application will be swapped for a different existing bus.
- **Exclude Bus:** Select this box if the bus to be swapped in the application will be excluded from the rebate.
- **Existing Bus Owner:** The owner of the existing bus must be selected from the drop-down list.
- **Existing Bus VIN, Fuel Type, GVWR, Model, Model Year, NCES District ID, Manufacturer, Average Annual Fuel Consumption, Average Annual Mileage, Estimated Remaining Life, Annual Idling Hours:** These fields are prepopulated with information you entered on your Payment Request Form.
- **Existing Bus Odometer:** The odometer reading of the existing bus to be replaced. If the exact reading is unknown, provide an estimate.
- **Existing Bus EPA Vehicle Family:** The 12-character alphanumeric EPA Vehicle Family name or 10- to 12-character CARB Executive Order ID. For instructions on where to find this value, see the “Existing Bus Information” section of this guide.
- **Replacement Process:** Existing buses can be either scrapped, sold, or donated. Model year 2010 and older buses can only be scrapped. Model year 2011 and newer buses can be scrapped, sold, or donated.
- **Scrap Yard Organization, Existing Bus Sold to, Existing Bus Donated to:** organizations which scrapped, purchased or received the existing bus.
- **Existing Bus Proof of Scrappage:** Attach photos and letter for all scrapped buses. Photos should be labeled with the last four digits of the VIN number and show the destroyed engine and chassis. Attach a letter signed by a representative of the scrap yard/entity that performed the scrappage.

- Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
 - Minimum file size: 1KB
 - Maximum file size: 5MB
- **New Bus Owner:** The name of the organization that will own the new bus.
 - **New Bus Service Provider:** Please select the organization that is providing transportation services to the school district stated within your award.
 - **Bus Rebate Amount Received:** The rebate received for this bus. This value is pulled from the Payment Request Form.
 - **Maximum Eligible Bus Rebate from Close Out Form:** Prepopulated based on new bus fuel type, new bus GVWR, and prioritization status of school district per the [2023 CSB Rebates Program Guide](#). If this is a propane or CNG replacement bus, this value is only for a bus rebate, as a rebate is not offered for infrastructure costs for CNG and propane buses. If you are swapping out an existing bus, the amount of the rebate requested for this bus cannot exceed the rebate amount from your Payment Request Form.
 - **Final Invoice:** Select the final invoice document for the new bus from the drop-down list.
 - **New Bus Purchase Price:** The purchase price of the ordered replacement school bus, including tax and any eligible training/consulting/warranty line item expenses associated with the individual bus in the final invoice.
 - **Proof of Delivery:** Select the document proving delivery (for example, a dated bill of lading) from the drop-down list.
 - **New Bus Dealer:** The entity selling the new bus that is listed on the final invoice.
 - **New Bus VIN:** The 17-digit Vehicle Identification Number for the bus delivered.
 - **New Bus Fuel Type:** The fuel type used by the new bus.
 - **New Bus Manufacturer:** Select the manufacturer of the new bus from the drop-down list. If the manufacturer is not listed, select Other.
 - **New Bus Manufacturer (Other):** This field appears if **Other** is selected for **New Bus Manufacturer**.
 - **Shipping Cost Rebate Received:** Rebate amount you received to cover the cost of shipping this bus outside the continental United States.
 - **New Bus GVWR:** Bus gross vehicle weight rating in pounds.
 - **New Bus Model:** Model name of the new bus.
 - **Bus Shipping Costs:** Actual shipping costs for this bus from the order document associated with this bus.
 - **Eligible Bus Shipping Rebate:** The bus shipping rebate this bus is eligible for is based on the bus shipping costs. If the bus shipping costs exceed the shipping cost rebate requested, then the bus is eligible for a bus shipping cost rebate up to \$20,000. If the bus shipping costs are less than the shipping cost rebate requested, then the bus is eligible for the amount entered into the Bus Shipping Costs field.
 - **Shipping Cost Responsibility:** If the bus shipping costs exceed the eligible bus shipping rebate, the applicant is responsible for paying the amount displayed here.

- **Replacement Bus Equipped with ADA-Compliant Wheelchair Lift?:** Check this box if the replacement bus has an ADA-compliant wheelchair lift.
 - **ADA-Compliance Rebate Received:** Rebate received for ADA-compliant wheelchair lift costs in the Payment Request Form.
 - **ADA-Compliance Costs:** Purchase price for equipping the bus with an ADA-compliant wheelchair lift.
 - **Eligible ADA-Compliance Rebate:** The rebate this bus is eligible for is based on the ADA-compliance costs entered. If these costs are more than the ADA-compliance rebate requested, then the bus is eligible for the ADA-compliance rebate requested amount of \$20,000. If the ADA-compliance costs are less than the ADA-compliance rebate requested, then the bus is eligible for the amount entered into the ADA-Compliance Costs field.
 - **ADA Cost Responsibility:** The portion of the ADA-compliance costs that exceed the ADA-compliance rebate received. The applicant is responsible for paying this amount.
 - **Total Eligible ADA and Shipping Rebate:** The sum of (if applicable) the eligible bus shipping rebate and the eligible ADA-compliance rebate.
- **New Bus EPA Vehicle Family:** The 12-character alphanumeric EPA Vehicle Family name or 10- to 12-character CARB Executive Order ID. For instructions on where to find this value, see the “[New Bus Information](#)” section of this guide.
- **New Bus Delivery Date:** Date that the new buses were delivered. If the new bus delivery date on the final invoice or proof of delivery differs from the actual delivery date, check the box below: **New Bus Delivery Date is the actual delivery date and differs from the new bus delivery date listed within the bill of lading (or other document).**
- **New Bus Model Year:** Model year of new bus.
- **Reason for Change of Bus Information:** Provide an explanation if any new bus information has changed from what was entered on the Payment Request Form.
- **New Bus Estimated Annual Mileage:** Estimated annual miles the new bus will travel.
- **Estimated EV Bus Range:** For electric buses only, the manufacturer’s estimated range in miles for the new bus.
- **Estimated Annual Idling Hours:** Estimated annual idling hours for the new bus.
- **EV Battery Capacity:** For electric buses only, rated battery capacity of the bus in kilowatt-hours.
- **Equipped with Auxiliary Heater?:** For electric buses only, select Yes if the new bus has an auxiliary heater.
- **Capable of Bidirectional Charging?:** For electric buses only, select Yes if the charger is capable of two-way charging (e.g., grid-to-vehicle and vehicle-to-grid).
- **Photo of New Bus and VIN Documentation:** Attach two photos for each bus: 1) a side view of the entire bus, and 2) photo of the VIN plate. Include the last four digits of the VIN in the file name of each photo.
- **Battery Warranty Included?:** Select Yes if there is a battery warranty included in the bus purchase.
- **Number of Years Covered:** Number of years that the battery warranty covers.
- **Miles Covered:** Number of miles that the battery warranty covers.

- **kWh of Gross Discharge Throughput:** Kilowatt-hours of gross discharge throughput that the battery warranty covers.
- **Battery Warranty Documents:** Document explaining conditions of the battery warranty.
- **Powertrain Warranty Included?:** Select Yes if the bus purchase includes a powertrain warranty.
- **Number of Buses Requested (Application):** Prepopulated from the information in your rebate application.
- **Number of Buses Ordered (Payment Request):** Prepopulated from the information in your Payment Request Form.
- **Number of Buses Received (Close Out):** Number of new buses on your Close Out Form.
- **Total Bus Costs from Payment Request:** The sum of all the bus costs from the Payment Request Form.
- **Total Bus Costs (Actual):** This calculated value is the sum of the new bus purchase price for all the replacement buses received and included in the Close Out Form.
- **Total Bus Rebate Received:** This calculated value is the total rebate amount received for all the buses ordered in the Payment Request Form.
- **Total Shipping Rebate Received:** Total rebate funding received to cover shipping costs. This value comes from your Payment Request Form.
- **Total Shipping Rebate Used (Actual):** Amount of shipping rebate used to cover shipping costs.
- **Total Shipping Costs (Actual):** Total actual shipping costs entered in the Close Out Form.
- **Total Shipping Cost Responsibility:** If total actual shipping costs exceed the total shipping rebate received, the difference is the amount the applicant is responsible for.
- **Total ADA Rebate Received:** Total rebate received to pay for ADA-compliant features. This value comes from your Payment Request Form.
- **Total ADA Rebate Used (Actual):** Amount of ADA rebate actually spent on accessibility features.
- **Total ADA Costs (Actual):** Total actual cost of ADA-compliant wheelchair lifts and associated expenses.
- **Total ADA Cost Responsibility:** If the actual total ADA costs exceed the total ADA rebate received, the difference is the amount the applicant is responsible for.
- **Total Bus ADA and Shipping Reimbursement Owed:** This warning appears if the actual shipping and ADA costs provided on the Close Out Form indicate that you are eligible for less funding than the rebate amount you were paid based on the approved Payment Request Form.

“Infrastructure” Page

- **Infrastructure Type:** The charging infrastructure to be purchased for all electric buses. **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):** The type of other eligible infrastructure costs found in the drop-down. Other eligible infrastructure costs include construction, electrical work, site preparation, design and engineering, labor and permitting, etc.
- **Other Eligible Infrastructure Cost:** Total costs for the infrastructure in the **Infrastructure Type (Other)** field.

- **Description of Work:** A detailed description of the infrastructure-related work entered in the Infrastructure Type (Other) field.
- **EVSE Maximum Output Power (kW):** The rated maximum output power of the charger (in kilowatts). For a Level 2 charger, this quantity should exceed 20 kW. For a DC fast charger, this quantity should not be less than 20 kW.
- **Infrastructure Quantity:** 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, the chargers need to be entered as separate infrastructure items.
- **EVSE Manufacturer:** The manufacturer of the charger is selected from a drop-down list.
- **EVSE Manufacturer (Other):** If the manufacturer is not an option in the drop-down list, select Other and enter the name in this field.
- **Infrastructure Cost per Charger:** The cost of each charger for that specific infrastructure line item, including installation cost if not listed separately.
- **EVSE Model:** The model name of the charger. If it is a Level 2 charger, the model name is listed on the Energy Star certification.
- **Total Taxes and Other Fees:** The total taxes and fees listed on the invoice.
- **EVSE Date of Manufacture:** The date (in the format MM/DD/YYYY) that the EVSE was manufactured, listed on the charger.
- **Infrastructure Subtotal:** This calculated field is the sum of infrastructure costs, taxes, and fees for this infrastructure item.
- **EVSE Date of Installation:** The date the infrastructure was installed in MM/DD/YYYY format.
- **Total Cost Listed on Invoice:** The total sum of infrastructure costs, installation, taxes, and fees for this item, as listed on the invoice. This amount should match the infrastructure subtotal. If it does not, a warning message will appear.
- **Cost Includes Installation:** Check this box if the cost listed in the **Infrastructure Cost per Charger** field includes installation.
- **Number of Plugs on EVSE:** The number of plugs on each charger.
- **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).
- **This Charger Is Energy Star Compliant:** This field is only required for Level 2 chargers and should be checked if all Level 2 chargers are Energy Star compliant.
- **This Charger or Infrastructure Materials Is Buy America Compliant:** See [2023 Clean School Bus Rebates Program Guide](#)'s Terms and Conditions and [OTAQ's BABA Implementation Procedures document](#) for information on Build America, Buy America requirements.
- **Infrastructure Installer:** Select the organization that will do the installation work.
- **Infrastructure Owner:** Select the organization that owns the infrastructure.
- **Electrification as a Service (EaaS Provider)** Select the organization that is providing EaaS services to the school district stated within your award.

- **Installation/Construction Address:** The location, including the street address, city, state or territory, zip code, and county, where the EVSE will be installed. Once the first infrastructure line item has been added, this field will be pre-filled to match, but still editable.
- **Final Invoice:** Upload the final invoice listing this infrastructure item.
- **Proof of Delivery:** Upload the proof of delivery document for this infrastructure item.
- **Infrastructure Vendor:**
- **Photos of Charging Equipment and photo of equipment serial number(s):** Upload a photo of the installed EVSE and serial number.
- **Level 2 Charger Costs from Payment Request:** The sum of all Level 2 charger costs entered on the Payment Request Form.
- **Level 2 Charger Costs (Actual):** The sum of all Level 2 charger costs entered on the Close Out Form.
- **DC Fast Charger Costs from Payment Request:** The sum of all DC fast charger costs entered on the Payment Request Form.
- **DC Fast Charger Costs (Actual):** The sum of all DC fast charger costs entered on the Close Out Form.
- **Other Infrastructure Costs (Actual):** The sum of all other eligible infrastructure costs entered on the Close Out Form.
- **Total Infrastructure Costs from Payment Request:** Total cost of all Level 2 chargers, DC fast chargers, and other eligible infrastructure costs from your Payment Request Form.
- **Total Infrastructure Costs (Actual):** Total costs entered in the Close Out Form for Level 2 chargers, DC fast chargers, and other eligible infrastructure costs.
- **Total Infrastructure Rebate Received:** Total infrastructure rebate received based on your Payment Request Form.

“Funding” Page

- **Existing Bus VIN:** 17-digit Vehicle Identification Number of the existing bus to be replaced.
- **Existing Bus Fuel Type:** Fuel type of existing bus to be replaced.
- **New Bus Fuel Type:** Fuel type of the new bus that will replace this existing bus.
- **Shipping Rebate Used:** If applicable, this field shows the amount of shipping rebate that was used to cover shipping costs to outside the continental United States.
- **ADA Rebate Used:** If applicable, this field shows the amount of ADA rebate funds used to purchase ADA-compliant accessibility features.
- **New Bus Purchase Price:** New bus purchase price you entered for this bus on the “Buses” page.
- **Eligible Bus and Infrastructure Rebate Amount:** The maximum eligible bus rebate from the “Buses” page of the Close Out Form.
- **Funding Allocation for This Bus:** Initially, this amount is what you allocated for this bus in the Payment Request Form. You may change this amount. The amount entered cannot be more than the lesser of the new bus purchase price or the eligible bus and infrastructure rebate amount. For electric buses, any remaining unallocated rebate amount for this bus will be available for eligible infrastructure costs.

- **Remaining Rebate Amount for This Bus:** The portion of this bus's rebate that has not been allocated to this bus. It is the difference between (1) the lesser of the new bus purchase price or the eligible bus and infrastructure rebate amount and (2) the funding allocation for this bus.
- **Remaining Rebate Amount for Infrastructure:** This amount is the eligible bus and infrastructure rebate amount minus the funding allocation for this bus.
- **Total Rebate Amount Received:** The total available rebate funding for bus(es) and infrastructure from your Payment Request Form.
- **Rebate Amount Allocated to All Buses:** The sum of funding allocation for all buses.
- **Total Bus Costs:** The sum of new bus purchase price for all buses.
- **Total Remaining Rebate Amount for All Buses:** Total rebate amount received minus the rebate amount allocated to all buses.
- **Non-EPA Funding Type:** Type of non-EPA funding. Options include federal, state, city, utility make-ready, nonprofit, and other.
- **Non-EPA Funding Source:** Source of non-EPA funding.
- **Non-EPA Funding Amount:** Dollar amount of non-EPA funding.
- **Total Non-EPA Funding Acquired:** The sum of all non-EPA funding sources.
- **Interest Earned on CSB Rebate:** select yes if any interest was earned on CSB rebate funding and select "No" if funds did not earn any interest.
- **Non-EPA Bus Funding Not Accounted For:** This calculated number shows the amount of non-EPA funding that is the applicant's responsibility but 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; if not all funding source amounts have been accounted for, this number will be positive.
- **Unallocated Bus Rebate Eligible for Infrastructure:** This is the amount of unallocated bus rebate that could be used for eligible infrastructure costs. It does not include unallocated CNG or propane bus rebate funding (if applicable).
- **Funding Allocation for All Eligible Infrastructure Costs:** Enter the rebate amount you would like to allocate for eligible infrastructure costs. You cannot allocate more than the lesser amount of the **Unallocated Bus Rebate Eligible for Infrastructure** and **Total Eligible Infrastructure Costs** fields. Any unallocated amount will reduce the amount of your rebate.
- **Total Infrastructure Non-EPA Funding Acquired:** The sum of all non-EPA funding amounts entered in the "Non-EPA Clean School Bus Infrastructure Funding Information" section of this page.
- **Non-EPA Infrastructure Funding Not Accounted For:** This calculated number shows the amount of non-EPA funding that is the applicant's responsibility but 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 all funding source amounts have not been accounted for, this number will be positive.
- **Infrastructure Reimbursement Owed to EPA:** Amount of excess EPA rebate that you may need to pay back to the EPA based on this Close Out Form.
- **Total Eligible Replacement Bus and Infrastructure Rebate Requested in Payment Request:** Total rebate amount from your Payment Request Form.

- **Total Allocated Rebate Amount:** This is the total rebate funding you have allocated for buses and eligible infrastructure.
- **Total Eligible Replacement Bus and Infrastructure Rebate Requested in Close Out:** After allocations made above.
- **Total Unallocated Requested Rebate Amount:** This is the amount of rebate funding that has not been allocated for buses or infrastructure. Your eligible rebate will be reduced by this amount.
- **Total Costs for Buses and Infrastructure:** The sum of actual bus and infrastructure costs entered in the Close Out Form.
- **Total Applicant Cost Responsibility:** The sum of actual bus and infrastructure costs minus the total eligible replacement bus and infrastructure rebate requested in close out.

“Build America, Buy America Compliance” Page

- **Is infrastructure used in this project BABA compliant?** On this page, you confirm whether the infrastructure identified on the “Infrastructure” page (for all infrastructure materials and chargers) will be Build America, Buy America Act compliant.

“Telematics” Page

- **Telematics Data:** Check this box if you are willing to provide bus or EVSE telematics data to the EPA or its partners for research purposes.
- **Telematic Contact Selection:** To identify your telematics contact person, select either Use Primary Contact, Use Alternate Contact, or Use Telematics Contact.

“Signature” Page

- **Total Bus Costs (Actual):** The sum of all actual bus costs.
- **Total Infrastructure Costs (Actual):** The sum of all actual costs of infrastructure and associated expenses.
- **Total Shipping and ADA Costs:** For applicants outside the continental United States, this amount is the sum of all bus shipping costs and costs to install ADA-compliant wheelchair lifts.
- **Total Combined Costs:** The sum of total bus costs (actual), total infrastructure costs (actual), and total Shipping and ADA costs, if applicable.
- **Total Applicant Responsibility:** The calculated difference between total combined costs and total combined rebate received. If the value is negative, the amount must be reimbursed to the EPA.
- **“Rebate Received” Fields**
 - **Total Bus Rebate Received:** Total rebate received to purchase buses.
 - **Total Shipping Rebate Received:** If applicable, amount received to cover bus shipping costs.
 - **Total ADA Rebate Received:** If applicable, amount received to cover the cost of ADA-compliant wheelchair lifts.
 - **Total Infrastructure Rebate Received:** Total rebate amount received to cover infrastructure materials and associated costs.
 - **Total Combined Rebate Received:** The sum of total bus rebate received and, if applicable, total infrastructure rebate received, total shipping rebate received, and total ADA rebate received.

■ “Rebate Used” Fields

- **Total Bus Rebate Used (Actual):** The sum of all actual funding allocated to buses.
- **Total Shipping Rebate Used (Actual):** If applicable, actual amount that was used toward shipping costs.
- **Total ADA Rebate Used (Actual):** If applicable, actual amount used to pay for ADA-compliant wheelchair lifts.
- **Total Infrastructure Rebate Used (Actual):** The sum of all actual funding allocated to infrastructure equipment and associated costs.

■ **Total Combined Rebate Used (Actual):** The sum of total bus rebate used (actual) and, if applicable, total shipping rebate used (actual), total ADA rebate used (actual), and total infrastructure rebate used (actual).

■ **Total Owed Back to EPA:** This field appears if the actual eligible costs entered on the Close Out Form are less than the sum of the total rebate amount received and any additional non-EPA funding you received. Additional actions will be necessary after submittal and review of the Close Out Form to settle this balance. You must refund this amount back to the EPA.

Appendix B: Printable List of Fields

This appendix lists fields that make up the Close Out Form. When filling out the Form, you will need to supply some, or all of the information listed in this appendix. Required fields are marked with an asterisk.

Note that this is only a printable reference. You will need to fill out the actual Close Out Form using the online dashboard described in this guide. There are other fields that are Form-generated that are not listed here, such as summary fields that total the information entered, and fields that indicate a reimbursement is needed.

Applicant Info (Page 2)

Organization County*

Applicant Primary Contact

This information is prepopulated but can be edited if you need to make changes.

Primary Contact First Name*

Primary Contact Last Name*

Primary Contact Title*

Primary Contact Business Phone Number*

Primary Contact Business Email*

Applicant Alternate Contact

Alternate Contact First Name

Alternate Contact Last Name

Alternate Contact Title

Alternate Contact Business Phone Number

Alternate Contact Business Email

School District Info (Page 3)

This information is prepopulated but can be edited if you need to make changes.

School District Contact Information

First Name*

Business Email*

Last Name*

Business Phone Number*

Title*

Organizations (Page 4)

The fields below will be filled out for each organization. Copy this page as needed for additional organizations.

General Information

Organization Type* (check all that apply) _____

Scrap Yard (existing bus)

Donee (existing bus)

Purchaser (existing bus)

Existing Bus Owner

New Bus Owner

Private Fleet (existing or new buses)

New Bus Dealer

Infrastructure Owner (electric bus charging)

Infrastructure Supplier (charging equipment only)

Infrastructure Installer

Other Infrastructure Organization

Telematics Contact

Electrification as a Service (EaaS provider)

Organization Name*

Address

Organization Address 1* _____

Organization City* _____

Organization Address 2* _____

Organization State or Territory* _____

Organization County* _____

Organization Zip* _____

Contact Information

This information is prepopulated but can be edited if you need to make changes.

Organization Contact First Name* _____

Organization Contact Business Email* _____

Organization Contact Last Name* _____

Organization Contact Business Phone Number* _____

Organization Contact Title* _____

Documents (Page 5)

Document Information

The fields below will be filled out for each document. Copy this page as needed for additional documents.

Document Name*

Document Description

Document Purpose (Choose all that apply)*

New Bus

Document Type*

Electric Bus Charging Equipment

Other Infrastructure Installation Costs

Does this document contain information for all buses? If yes, select **Apply [Document Type] to all buses.**

Does this document contain information for all charging infrastructure items? If yes, select **Apply [Document Type] to all charging infrastructure.**

Does this document contain information for all other infrastructure items? If yes, select **Apply [Document Type] to all other infrastructure.**

Associated Purchaser*

Associated Vendor*

Document Upload*

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

Minimum file size: 1KB

Maximum file size: 5MB

Buses (Page 6)

General Information

Number of School Buses in Current Fleet*

Number of Electric School Buses in Current Fleet*

Bus Information

Existing Bus Odometer*

Existing Bus EPA Vehicle Family*

Swap or Exclude Existing Bus

Would you like to swap this existing bus and choose a different bus to be replaced instead?

When swapping an existing bus, fill out the fields below.

Reason for Swapping Existing Bus*

No longer own bus

Bus no longer in service

Another bus is better option

Contracted with another bus provider

Other

Reason for Swapping Existing Bus (Other)

Would you like to exclude this existing bus from the rebate?

If you are not swapping or excluding this bus, the information below is prepopulated.

Existing Bus Information

Existing Bus Owner*

Existing Bus VIN*

Existing Bus NCES District ID*

Existing Bus Fuel Type*

Existing Bus Model*

Existing Bus Manufacturer*

Existing Bus GVWR*

Existing Bus Model Year*

Existing Bus EPA Vehicle Family

Existing Bus Average Annual Fuel Consumption*

Estimated Remaining Life*

Existing Bus Average Annual Mileage*

Existing Bus Annual Idling Hours*

Existing Bus Title (if swapped)

File Upload: Existing Bus Title*

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

Minimum file size: 1KB

Maximum file size: 5MB

Replacement Process*

Scrapped

Sold

Donated

Scrap Yard Organization (if scrapped)*

Existing Bus Sold To (if sold)*

Existing Bus Donated To (if donated)*

File Upload: Existing Bus Proof of Scrappage (if scrapped)*

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

Minimum file size: 1KB

Maximum file size: 5MB

New Bus Information

New Bus Owner*

New Bus Service Provider*

Proof of Delivery*

Final Invoice*

New Bus Purchase Price*

New Bus Dealer*

New Bus Fuel Type*

New Bus VIN*

New Bus Manufacturer*

New Bus GVWR*

New Bus Model*

Bus Shipping Costs*

Replacement Bus Equipped with ADA-Compliant Wheelchair Lift

ADA-Compliance Costs*

New Bus EPA Vehicle Family*

New Bus Delivery Date*

New Bus Model Year*

New Bus Delivery Date is the actual delivery date and differs from the new bus delivery dates listed within the bill of lading (or other document).

Reason for Change of Bus Information (if changed)

New Bus Estimated Annual Mileage* Estimated EV Bus Range* Estimated Annual Idling Hours*

EV Battery Capacity* Equipped with Auxiliary Heater?*

Capable of Bidirectional Charging?*

File Upload: Photo of New Bus and VIN Documentation*
Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
Minimum file size: 1KB
Maximum file size: 5MB

Battery Warranty

Only necessary if the purchase includes a battery warranty.

Battery Warranty Included?

Yes

No

Number of Years Covered Miles Covered kWh of Gross Discharge Throughput

File Upload: Battery Warranty Documents
Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
Minimum file size: 1KB
Maximum file size: 5MB

Powertrain Warranty

Only necessary if the purchase includes a powertrain warranty.

Powertrain Warranty Included? Number of Years Covered

Miles Covered

File Upload: Powertrain Warranty Documents
Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
Minimum file size: 1KB
Maximum file size: 5MB

Infrastructure (Page 7)

Infrastructure Information (if applicable)

Infrastructure Type*

Level 2 Charger

DC Fast Charger

Other Eligible Infrastructure Costs

For Level 2 chargers or DC fast chargers:

EVSE Maximum Output Power (kW)*

Infrastructure Quantity*

EVSE Manufacturer*

Infrastructure Cost per Charger*

EVSE Model*

Total Taxes and Other Fees*

EVSE Date of Manufacture*

EVSE Date of Installation*

Total Cost Listed on Invoice*

Number of Plugs on EVSE*

EVSE Capable of Bidirectional Charging?

This Charger Is Energy Star Compliant* (required if Level 2 charger)

This Charger or Infrastructure Materials Is Buy America Compliant

For other eligible infrastructure costs:

Infrastructure Type (Other)*

Other Eligible Infrastructure Cost*

Total Taxes and Other Fees*

Description of Work*

--

Total Cost Listed on Invoice*

For all infrastructure:

Infrastructure Installer*

Infrastructure Owner*

Installation/Construction Address

Street Address*

City*

County*

State or Territory*

Zip*

Documents and Photos

Final Invoice*

Proof of Delivery*

File Upload: Photo of Charging Equipment*
Allowed file types: *.pdf, *.png, *.jpeg, *.jpg
Minimum file size: 1KB
Maximum file size: 5MB

Funding (Page 8)

Bus Funding Allocations

Copy this section as needed for each bus.

Funding Allocation for This Bus*

Non-EPA Clean School Bus Funding Information

Copy this section as needed for each source of non-EPA clean school bus funding.

Non-EPA Funding Type*

Non-EPA Funding Source*

Non-EPA Funding Amount*

Infrastructure Award Allocations

Funding Allocation for All Eligible Infrastructure Costs*

Non-EPA Clean School Bus Infrastructure Funding Information

Non-EPA Funding Type*

Source of Additional Non-EPA Funding*

Non-EPA Funding Amount*

Build America, Buy America Compliance (Page 9)

Is infrastructure used in this project BABA compliant? *

Yes, all project infrastructure meets BABA requirements, including non-EPA funded infrastructure for which the purchasing process was initiated after Aug 8, 2025

Yes, I am using a BABA Waiver for some or all project infrastructure

No BABA does not apply to this project infrastructure

If Yes with a Waiver:

Please select the approved waiver(s) that applies to your project

Multi-Agency General Applicability Public Interest Waiver for Indian Tribes

EPA Electronic Vehicle Chargers Product Waiver of Section 70914(a) of P. L. 117-58, Build America, Buy America Act

EPA De Minimis General Applicability Waiver of Section 70914 of P.L. 117-58, Build America, Buy America Act

EPA Small Project General Applicability Waiver of Section 70914(a) of P.L. 117-58, Build America, Buy America Act

Multi-Agency General Applicability Public Interest Waiver for Pacific Island Territories

Approved Project-Specific Waiver

Project-Specific Waiver

Project specific Waiver Name

Date approved

If answer is "No BABA does not apply to this project infrastructure"

Please answer

Fueling infrastructure for the EPA-funded buses is not part of the same project as the EPA-funded buses based on the Purpose, Time, and Place test

The purchasing process for the charging or other fueling infrastructure in this school bus project was initiated prior to August 8, 2025

Telematics (Page 10)

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.

Signature (Page 11)

Review summary information, sign, and confirm signature in checkbox