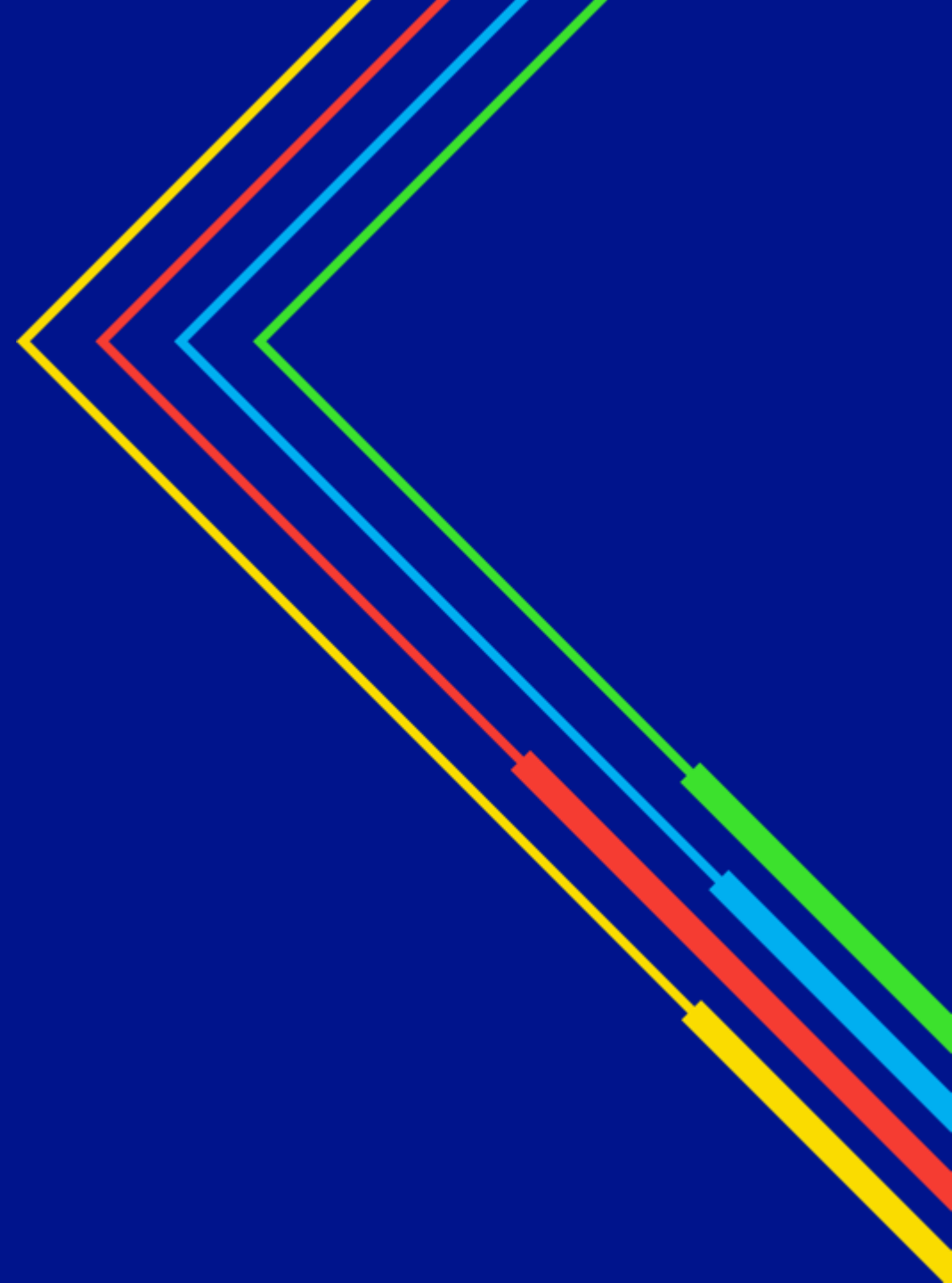


How to Edit a Draft EV Application

EV Make-Ready – New York & Massachusetts

November 23, 2023



How to Edit a Draft EV Application

HOW TO EDIT A DRAFT EV APPLICATION



Learning Objectives

This module outlines the steps for editing a saved EV application.

The **intended audience** for this module is as follows:

- EV TRADE PARTNER

By the end of this module, users will be able to:

- Locate their saved EV Application
- Resume progress on and update their draft EV Application
- Save or cancel their EV Application

National Grid Clean Energy Portal Home Page

HOW TO EDIT A DRAFT EV APPLICATION

When users save their EV application at any step in the application process, it will get saved with a **Draft** status and they can view it in the list of **Action Items** on the Clean Energy Portal **EV Home Page**.

Action Items		View All
CE-0000001346 XYZ EVs NY	Documents Needed	Review
CE-0000003214 5800064461	Draft	Continue
CE-0000002762 2039961112	Draft	Continue

Opening the Draft EV Application

HOW TO EDIT A DRAFT EV APPLICATION

Users can update a saved draft EV application any time they want. Once the application is submitted, users cannot edit the details via the Clean Energy Portal, but they may still upload additional files at all stages of the application.

1 To start updating a saved draft application, click the **Continue** button for the application. In this example, click **Continue** for **CE-0000003214**.

Action Items		View All
CE-0000001346 XYZ EVs NY	Documents Needed	Review
CE-0000003214 5800064461	Draft	Continue
CE-0000002762 2039961112	Draft	Continue

Application Details (1/3)

HOW TO EDIT A DRAFT EV APPLICATION

- A** The application will open in a new tab. Users can view the highlights of the application such as **Billing Account Number**, **Program Name**, **Application Type**, and **Jurisdiction**.
- B** Below the highlights, a status path will indicate the progress of the application. At this stage, the application will have a **Draft** status. Once the application is submitted, the status will change to **Submitted**.

Home EV Home Page Application

▼ Clean Energy Application CE-0000003214

Submit Application Cancel Application

Billing Account Number	Program Name	Application Type	Jurisdiction	Incentive Amount
5800064461	EV Make-Ready Program - New York	Simple	New York	

> **Draft** Submitted PM Review PM Revi... Applicati... Applicati... Under C... Construc... Close Ou... ◀ ▶

Application Details (2/3)

HOW TO EDIT A DRAFT EV APPLICATION

C The **Details** section below the status path will show the application details including **Created By**, **Submitted Date** (currently empty as the application has not been submitted yet), **Customer Name**, **Legacy Application Number** (empty as the application is new), **Billing Account Number**, and **Service Address Zip Code**.

D The **Files** section will display all files that the user has attached to the application. If the user wants to attach additional files, they can click the drop-down arrow in the **Files** section and then select the **Add Files** option.

Guidance for Success

Application is saved but not submitted, click on the "Submit" button at the top right of the page to submit the application.



Created By CE EV QA Partner Contact	Submitted Date _____
Customer Name ABC Chargers	Legacy Application Number _____
Billing Account Number 5800064461	Service Address Zip Code 13601-2750



Files (2)

Project Estimate
Nov 23, 2023 • 25KB • xlsx

ABC_Site Drawings
Nov 23, 2023 • 663KB • jpg


[Add Files](#)

[View All](#)

Application Details (3/3)

HOW TO EDIT A DRAFT EV APPLICATION

E Individual sections below the **Details** section will show all the fields with the information the user added during each step in the application. Users can click the **Edit** button in each section to make any changes to the section, if needed.

▼ Requirements **E**


Is there a Work Request Number?	Work Request Number
No	
Power Source Type	Power Source Location
208V Three Phase	Pole 356
Electric Panel Type	Electric Panel Location
Existing	Outside garage
Other Requirements	Fleet Advisory Services?
	Yes
Future-Proofing?	Cost of Future Proofing Activity
Yes	\$6,000.00

Editing the EV Application (1/4)

HOW TO EDIT A DRAFT EV APPLICATION

Charging Station Equipment

Level 2: CT4000

Charger Type
Level 2

Model Number
CT4000

Number of Ports
10

Site Load (kW)
72

Plug/Port Type
J1772

Manufacturer
ChargePoint

Number of Stations
5

Maximum Charging Rate of Ports (kW)
7.2

Network Provider
ChargePoint

Demand Management Software Enabled?
Yes



2 For this example, let's edit the **Charging Station Equipment** section to update the charger details. Click the **Edit** button in the section.

Editing the EV Application (2/4)

HOW TO EDIT A DRAFT EV APPLICATION

A pop-up window will open with the existing charger details.

3 In this example, update the charger details as follows:

- **Manufacturer:** Enter **EvoCharge**
- **Model Number:** Enter **iEVSE**
- **Network Provider:** Enter **EV Connect**

Charging Station Equipment

Charger Type

- Level 2
 DCFC

* Manufacturer

ChargePoint

* Model Number

CT4000

* Network Provider

ChargePoint

* Plug Type

J1772

* Number of Stations

5

* Demand Management Software Enabled?

- Yes
 No

* What is the modified site load?

70

Cancel

Save

Editing the EV Application (3/4)

HOW TO EDIT A DRAFT EV APPLICATION

Charging Station Equipment

Charger Type

Level 2
 DCFC

* **Manufacturer**

EvoCharge

* **Model Number**

iEVSE

* **Network Provider**

EV Connect

* **Plug Type**

J1772

* **Number of Stations**

5

* **Demand Management Software Enabled?**

Yes
 No

* **What is the modified site load?**

70

Cancel

Save

4 Click the **Save** button to save the changes.

i Users can cancel the changes by clicking the **Cancel** button.

Editing the EV Application (4/4)

HOW TO EDIT A DRAFT EV APPLICATION

Upon selecting **Save** in Step 4, the details will be updated.

Similarly, users can update other sections, as needed.

Level 2: iEVSE Edit

Charger Type	Manufacturer
Level 2	EvoCharge
Model Number	Number of Stations
iEVSE	5
Number of Ports	Maximum Charging Rate of Ports (kW)
10	7.2
Site Load (kW)	Network Provider
72	EV Connect
Plug/Port Type	Demand Management Software Enabled?
J1772	Yes
What is the modified site load?	Is this a Bidirectional Charger?
70	No
Please provide a detailed description of any Distributed Generation or Storage associated with these Charging Stations.	

Review and Submission (1/2)

HOW TO EDIT A DRAFT EV APPLICATION

nationalgrid

CE EV QA Partner Co...
CE EV QA Partner A...

5a

To submit the application, click the **Submit Application** button.

Home EV Home Page Application

Clean Energy Application CE-0000003214

Submit Application

Cancel Application

Billing Account Number	Program Name	Application Type	Jurisdiction	Incentive Amount
5800064461	EV Make-Ready Program - New York	Simple	New York	

▼ Draft Submitted PM Review PM Revi... Applicati... Applicati... Under C... Construc... Close Ou... ◀ ▶

Guidance for Success

Review and Submission (2/2)

HOW TO EDIT A DRAFT EV APPLICATION

The screenshot displays the National Grid Clean Energy Portal interface. At the top left is the 'nationalgrid' logo. At the top right, there is a user profile icon and the text 'CE EV QA Partner Co...' and 'CE EV QA Partner A...'. Below the logo is a dark blue navigation bar with 'Home' and 'Applications' links. The main content area features a white message box with the text 'Application has been successfully submitted for review!'. To the right of this message is a blue 'Finish' button. A pink callout box points to the message, and a red callout box points to the 'Finish' button.



A message will appear that the application has been successfully submitted for review.

5b

Click the **Finish** button to return to the Clean Energy Portal **Home** Page.

Clean Energy Portal Home Page

HOW TO EDIT A DRAFT EV APPLICATION

Users will be taken back to the Clean Energy Portal **Home** page. They can view their application under the **In Progress** section in the **Application** tab. The status of the application will change from **Draft** to **Submitted**, and it will no longer be available under **Action Items** on the **EV Home Page**. Next, the application will be reviewed by the National Grid EV Analyst and Program Manager.

nationalgrid CE EV QA Partner

Home EV Home Page **Application**

Q Search

Application Number	Legacy Application Number	Customer Name	Billing Account Number	City, State	Charger Type	Incentive Amount	Status
CE-0000003214		ABC Chargers	5800064461	WATERTOWN, NY	Level 2		Submitted
CE-0000003213		ABC Chargers	5800064461	WATERTOWN, NY	DCFC		Submitted
CE-0000003212		ABC Chargers	5800064461	WATERTOWN, NY	Level 2	\$25,000.00	Construction Complete
CE-0000003112		ABC Chargers	5800064461	WATERTOWN, NY	DCFC		PM Review Completed
CE-0000001391	EV-178670	NY Chargers INC	XYZ EVs NY	VB, NY	Level 2	\$28,300.00	PM Review Completed
CE-0000001346	EV-178669	NY Chargers INC	XYZ EVs NY	VB, NY	DCFC	\$18,000.00	Processing Payment

Cancelling the EV Application (1/3)

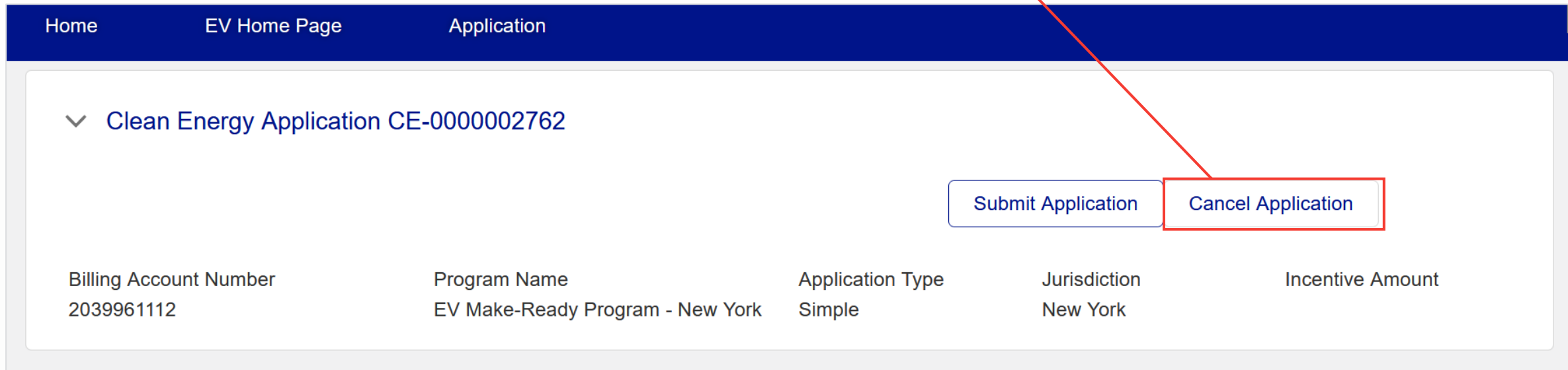
HOW TO EDIT A DRAFT EV APPLICATION

6a

To Cancel the application, select the **Cancel Application** button.

PLEASE NOTE:

- Cancelling the application will delete the full application, including all progress made & data saved to the application since it was first created.
- Cancelling a newly revised application **WILL NOT** revert it to its previous version.



Billing Account Number	Program Name	Application Type	Jurisdiction	Incentive Amount
2039961112	EV Make-Ready Program - New York	Simple	New York	

Cancelling the EV Application (2/3)

HOW TO EDIT A DRAFT EV APPLICATION

Upon selecting **Cancel Application**, a warning will appear to confirm this action, and to alert the user that all data will be lost if they select **Continue**.

The screenshot shows the National Grid website interface. At the top left is the 'nationalgrid' logo. Below it is a dark blue navigation bar with 'Home' and 'Applications' tabs. The 'Home' tab is highlighted with a red box. The main content area displays a warning message: 'Are you sure you want to cancel this application? All data will be lost.' At the bottom right of this area is a blue 'Continue' button, also highlighted with a red box. Two callout boxes provide additional instructions: box 6b points to the 'Home' tab, and box 6c points to the 'Continue' button.

nationalgrid

Home Applications

6b If the user no longer wishes to cancel the application, they can select the **Home** tab to return to the Clean Energy Portal home page.

Are you sure you want to cancel this application?
All data will be lost.

6c To proceed with cancelling the application, select **Continue**.

Continue

Review and Submission (3/3)

HOW TO EDIT A DRAFT EV APPLICATION

The screenshot shows the National Grid Clean Energy Portal interface. At the top left is the 'nationalgrid' logo. At the top right is the user profile for 'minakshi chaudhary National Grid Clean ...'. Below the header is a dark blue navigation bar with 'Home' and 'Applications' tabs. The main content area displays a message: 'Application has been cancelled.' A pink box highlights this message. To the right of the message is a blue 'Finish' button, which is highlighted with a red box. A red line connects the 'Finish' button to a callout box at the bottom right. A pink callout box at the bottom left explains the cancelled message.

i A message will appear that the application has been cancelled.

6d

Click the **Finish** button. Once done, the user will be directed to the Clean Energy Portal **Home** page, where the application will no longer be visible.

End of Procedure