IT and Digital

How to Edit a Draft EV Application

EV Make-Ready – New York & Massachusetts

November 23, 2023

nationalgrid

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

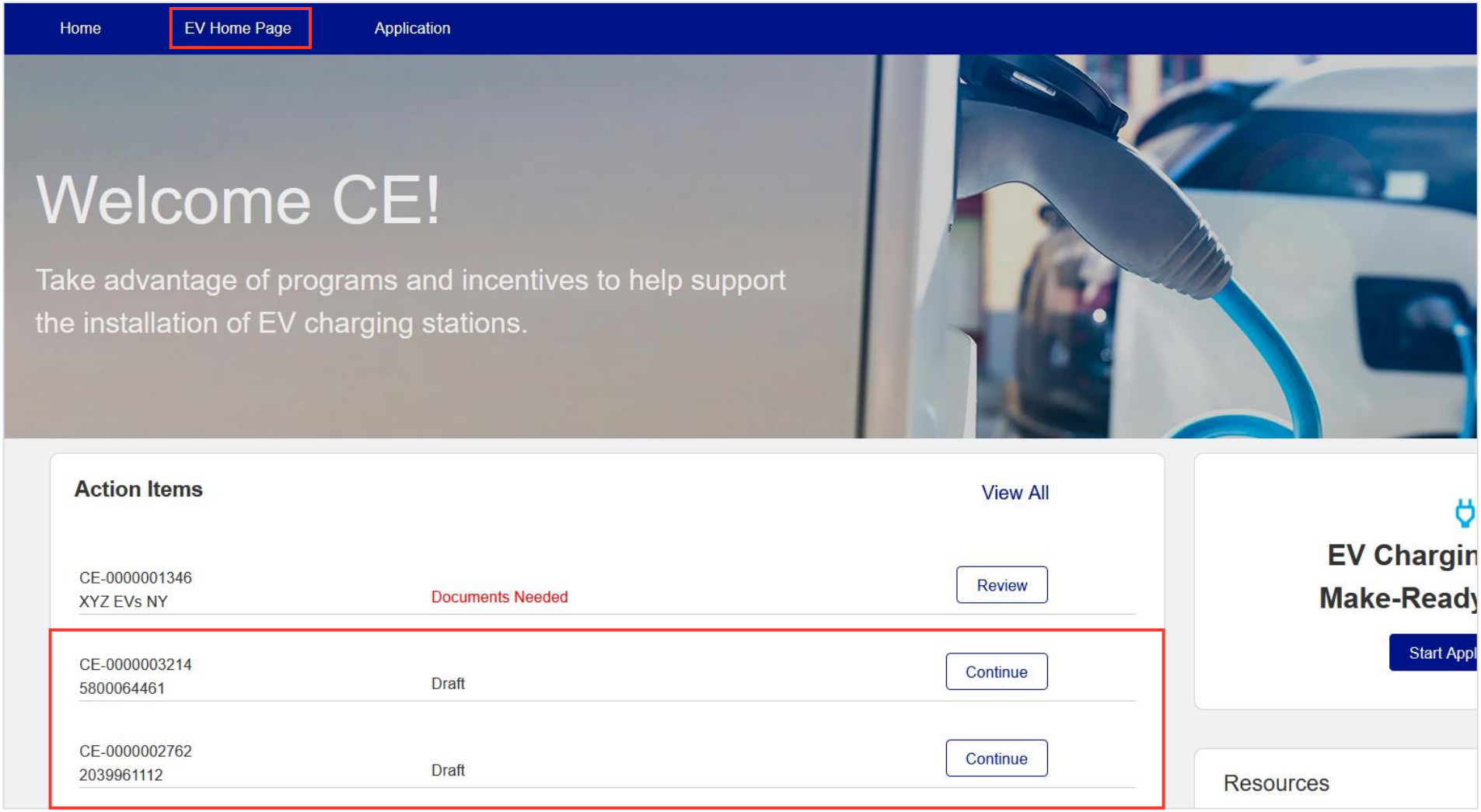
By the end of this module, users will be able to:

- 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

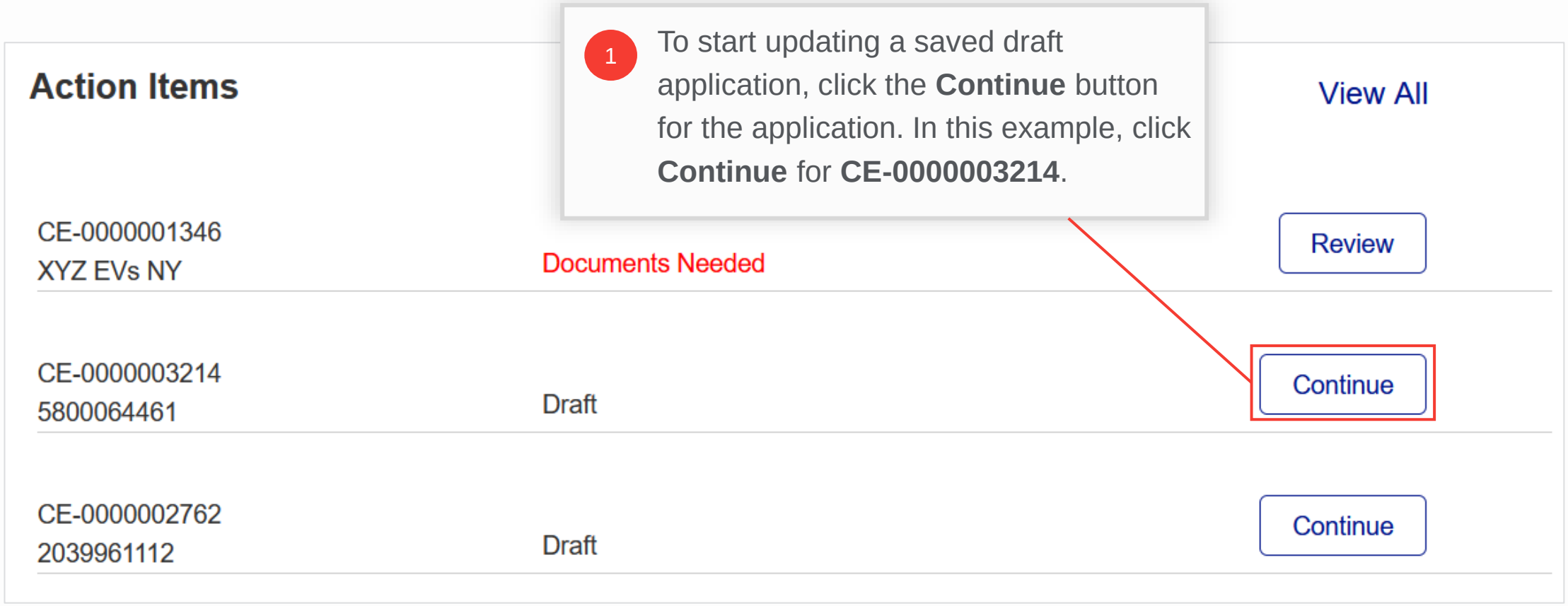
When users save their EV application at any step in the application process, it will get saved with a **Draft** status and they can view it in the list of **Action Items** on the Clean Energy Portal **EV Home Page**.



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.

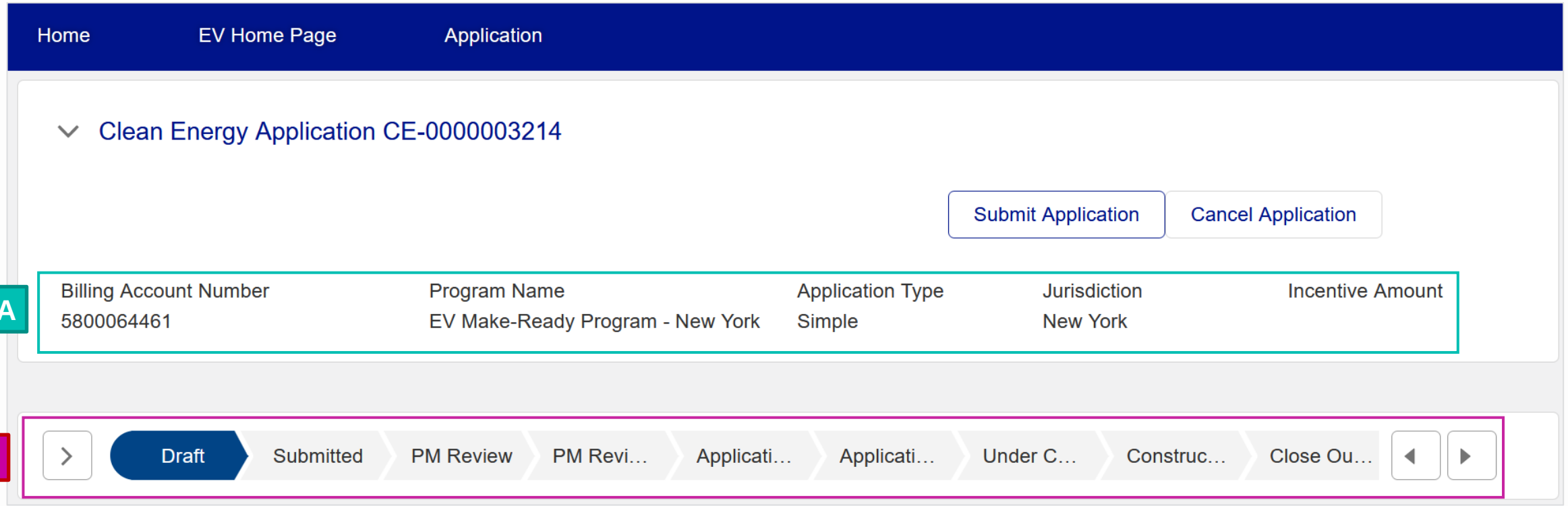


Application Details (1/3)

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**.

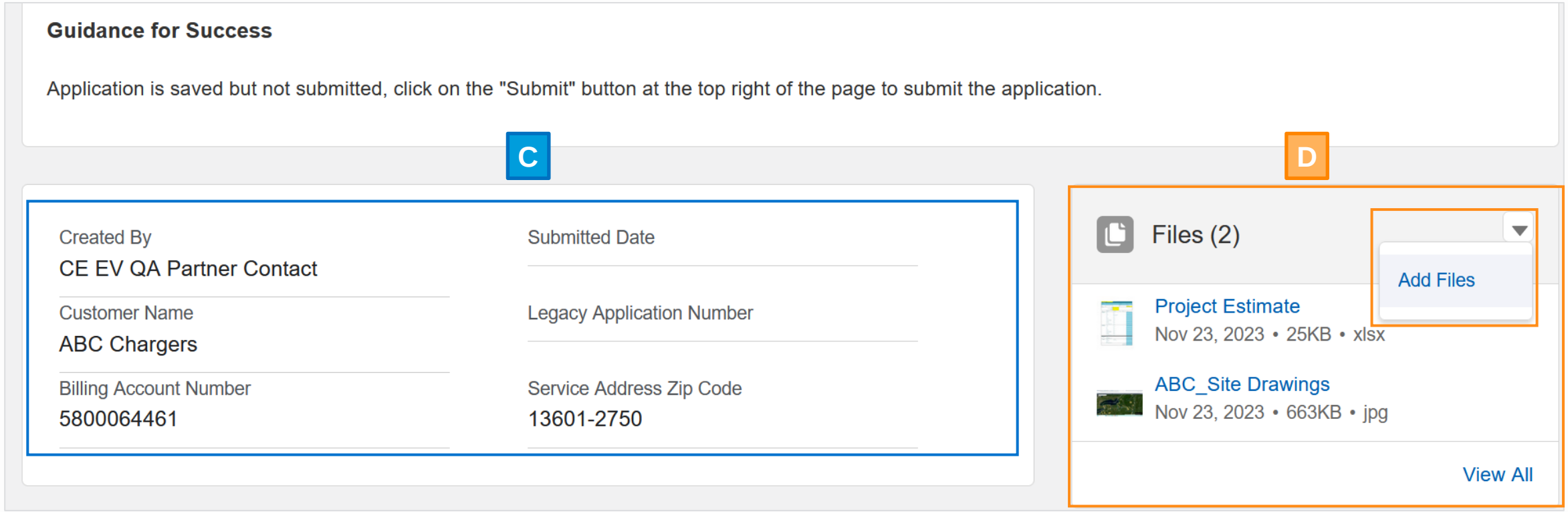


Application Details (2/3)

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**.

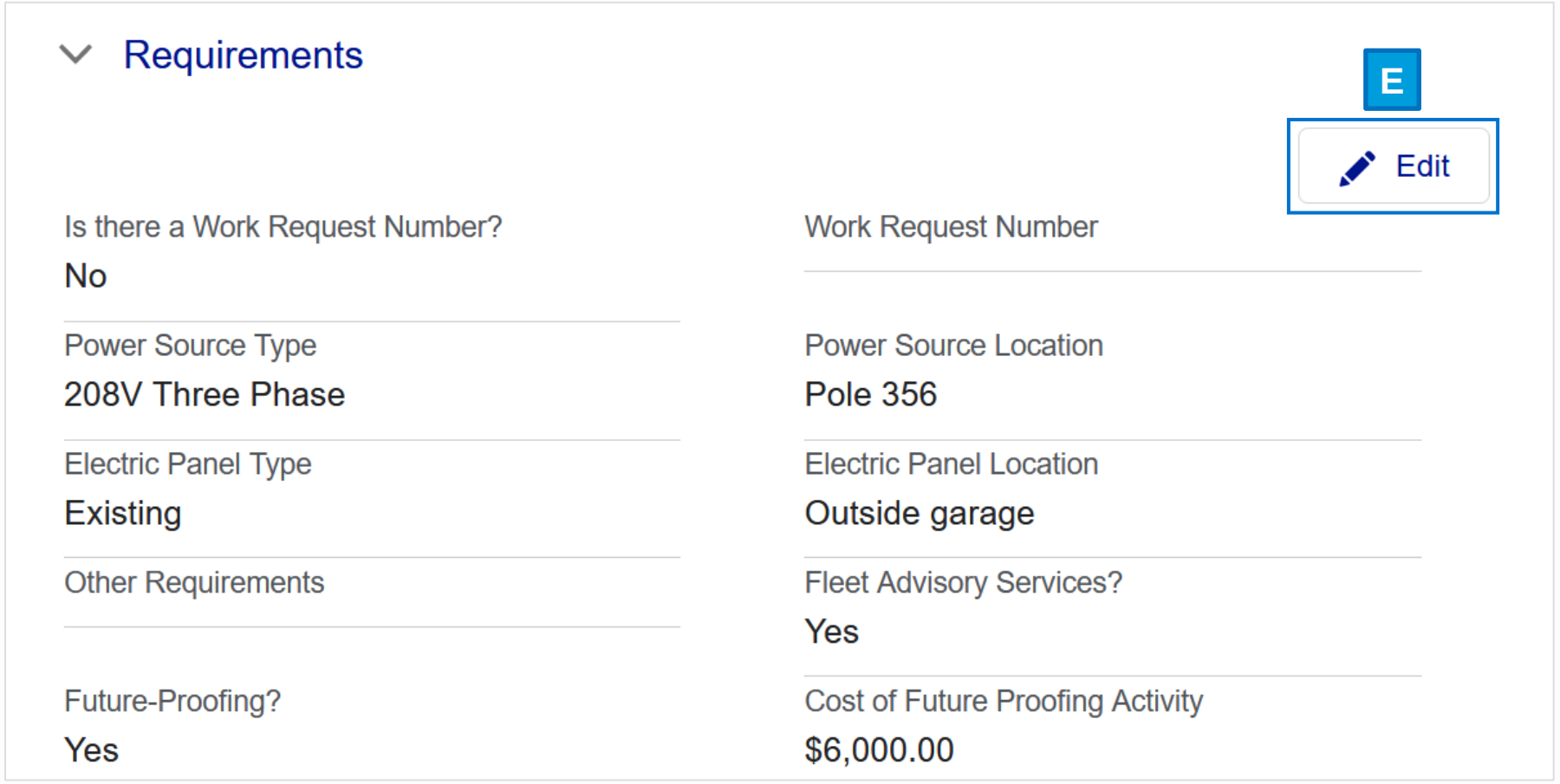
D The **Files** section will display all files that the user has attached to the application. If the user wants to attach additional files, they can click the drop-down arrow in the **Files** section and then select the **Add Files** option.



Application Details (3/3)

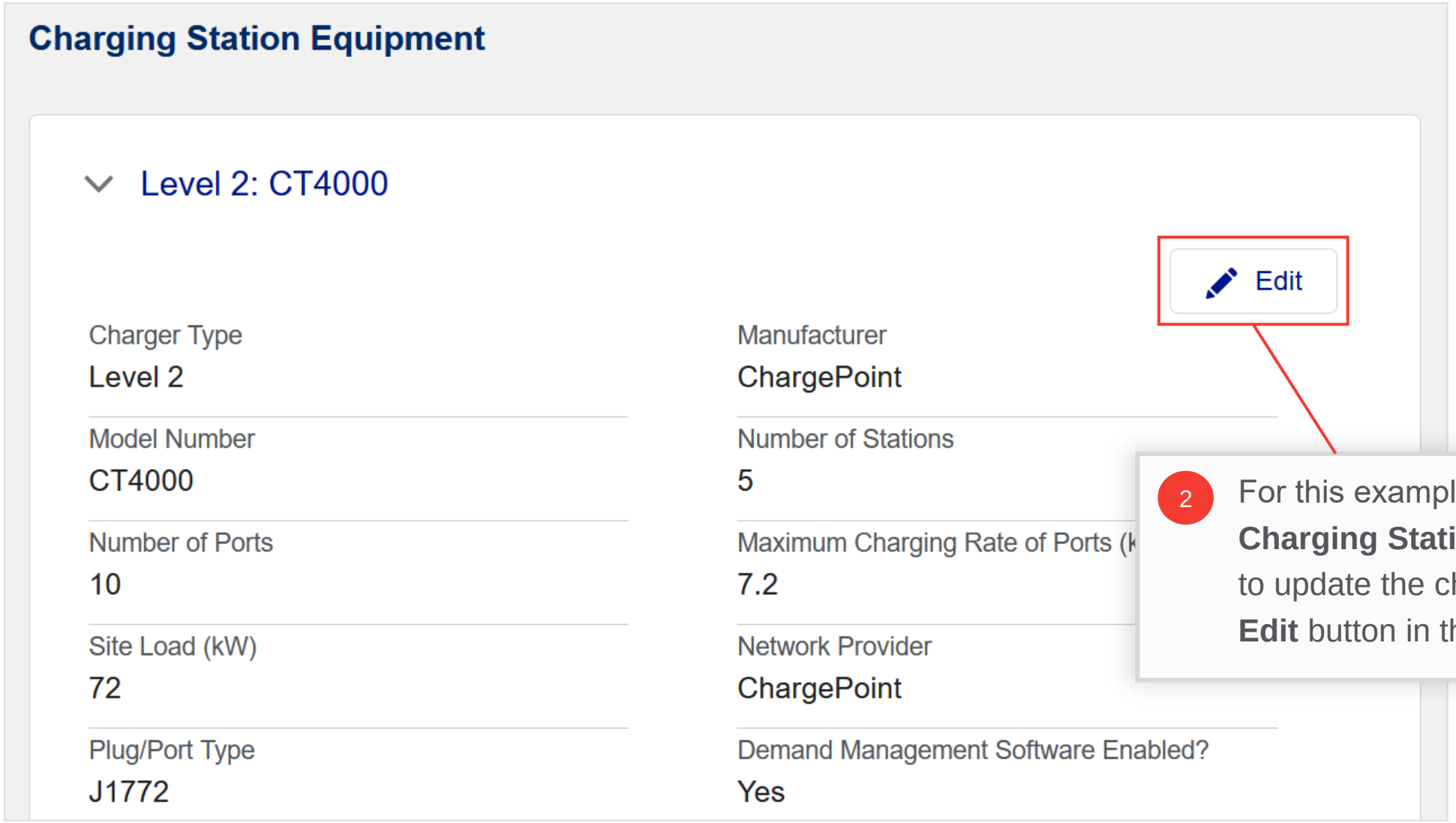
HOW TO EDIT A DRAFT EV APPLICATION

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.



Editing the EV Application (1/4)

HOW TO EDIT A DRAFT EV APPLICATION



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

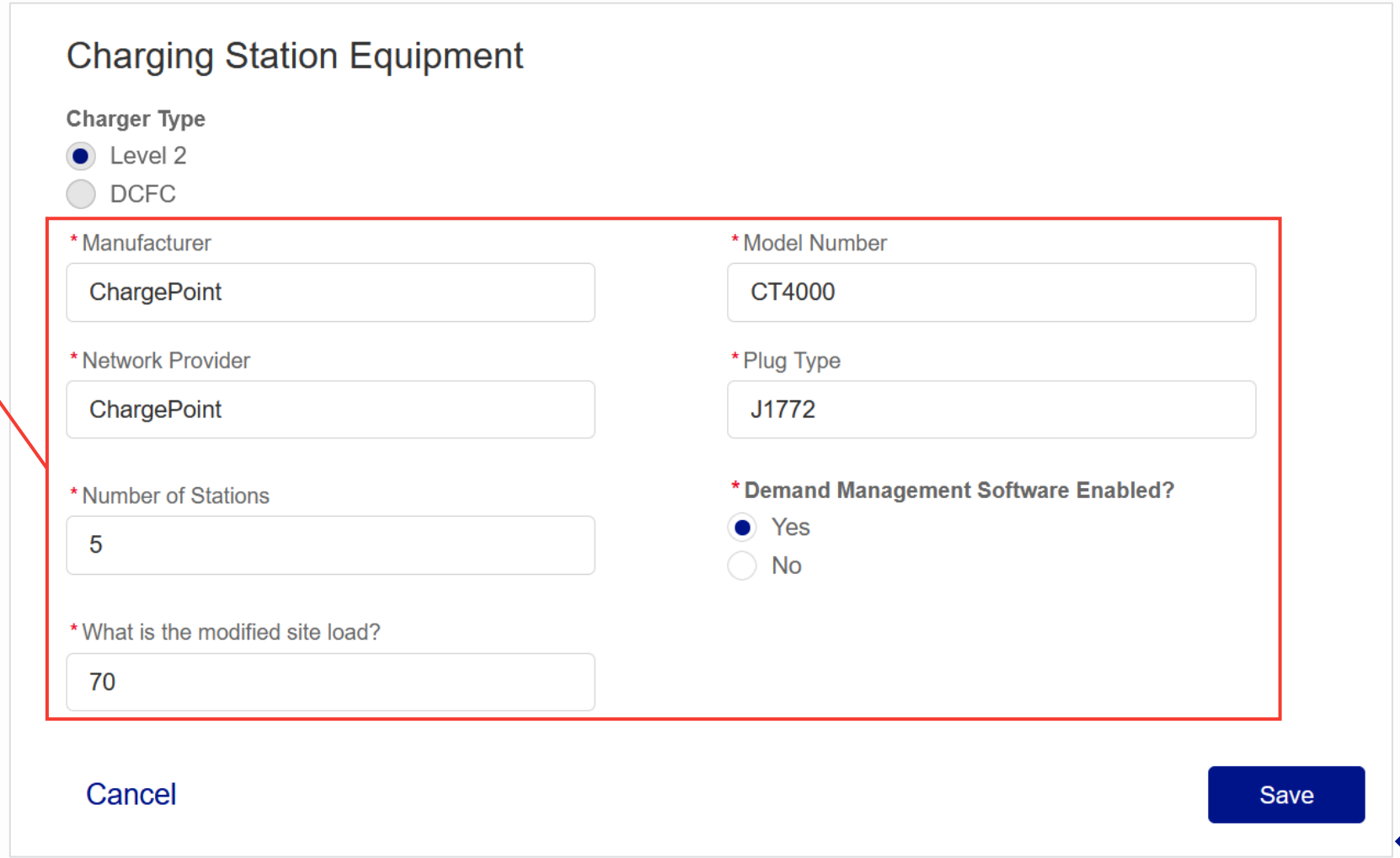
Editing the EV Application (2/4)

HOW TO EDIT A DRAFT EV APPLICATION

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

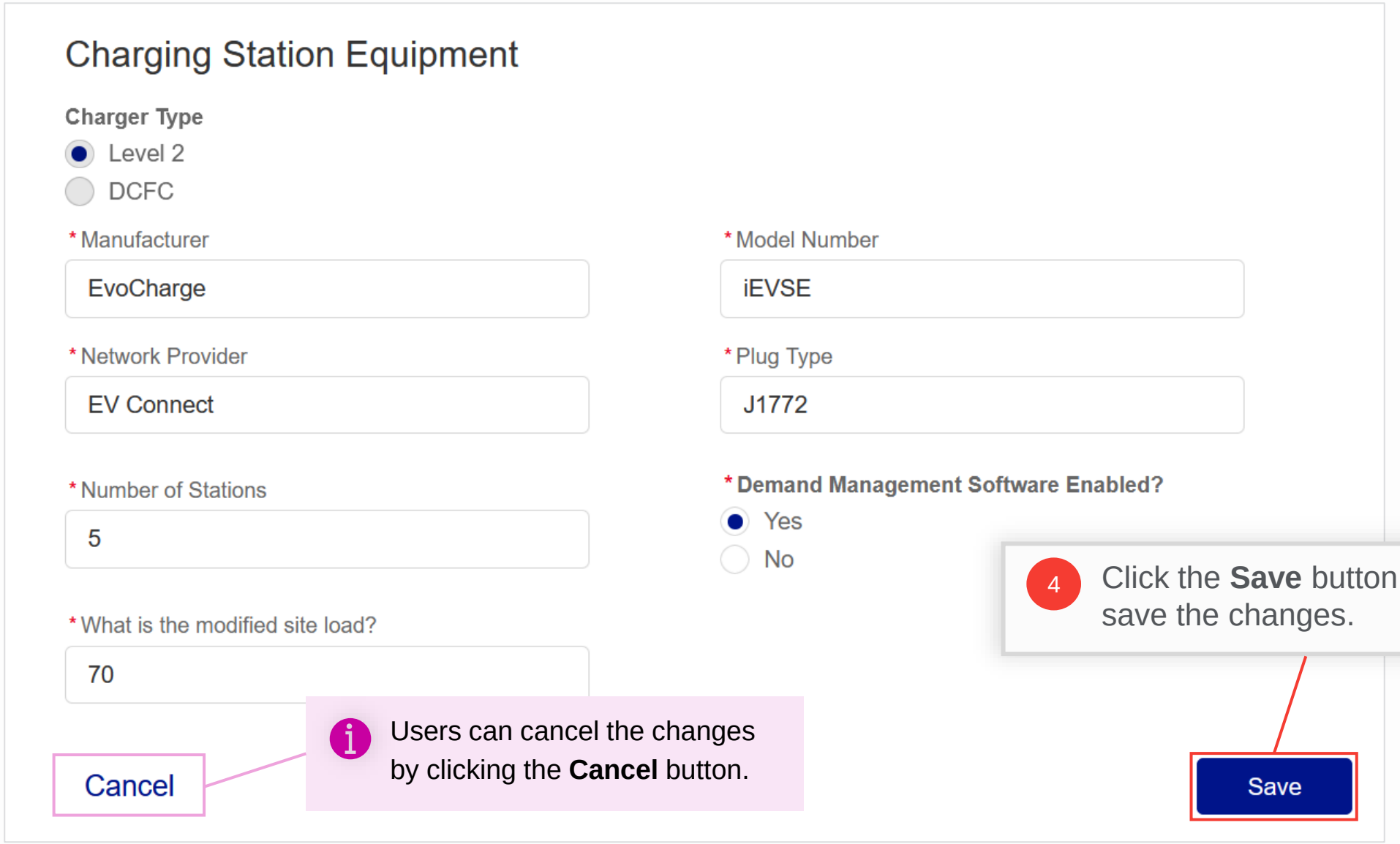
3 In this example, update the charger details as follows:

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



Editing the EV Application (3/4)

HOW TO EDIT A DRAFT EV APPLICATION

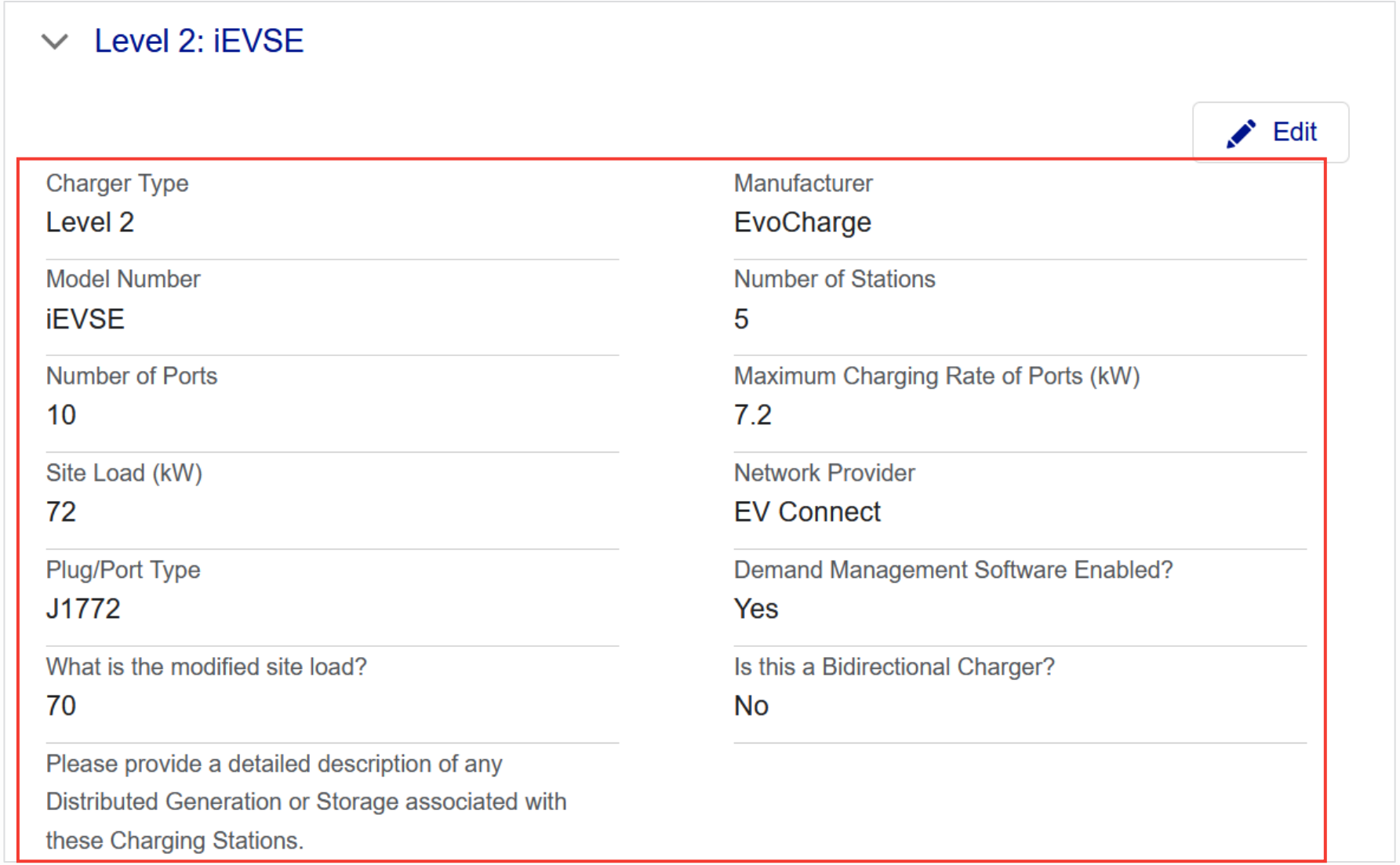


Editing the EV Application (4/4)

HOW TO EDIT A DRAFT EV APPLICATION

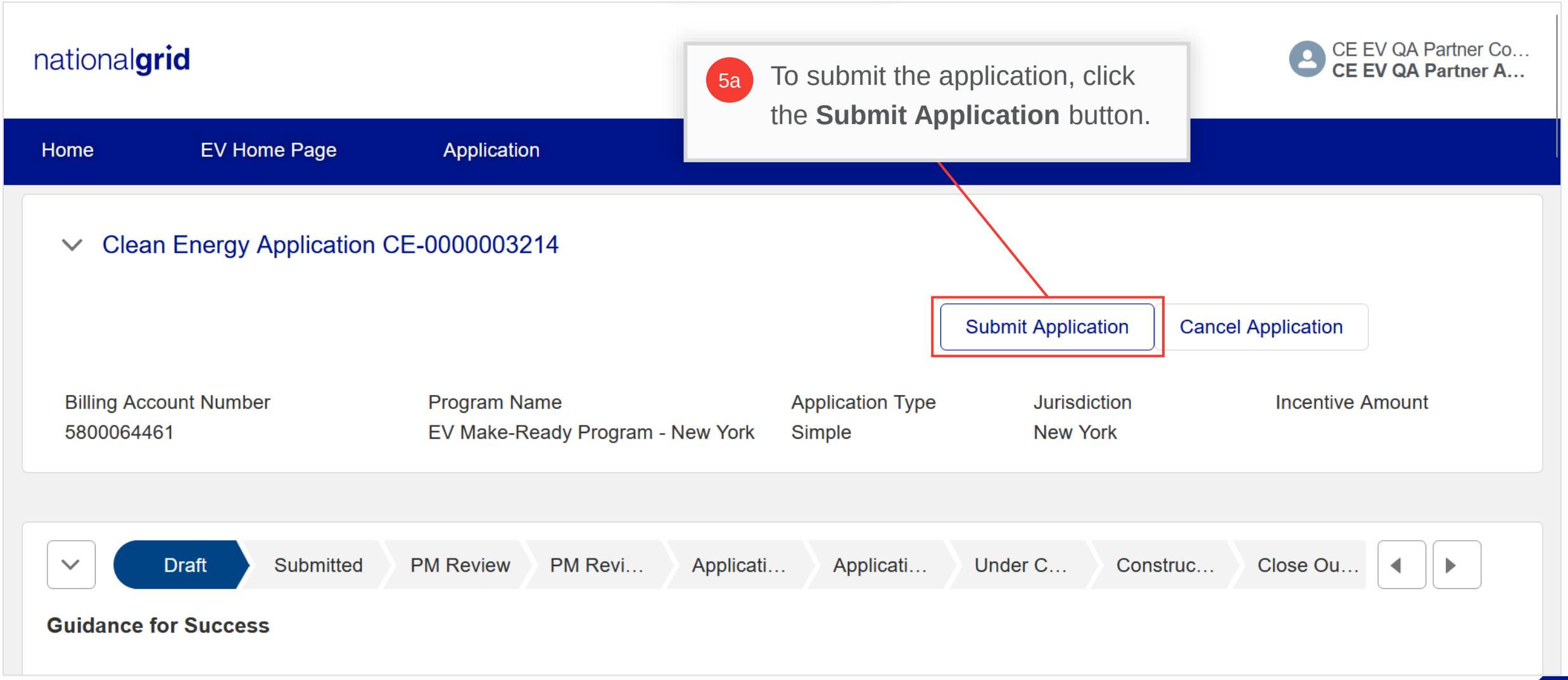
Upon selecting **Save** in Step 4, the details will be updated.

Similarly, users can update other sections, as needed.



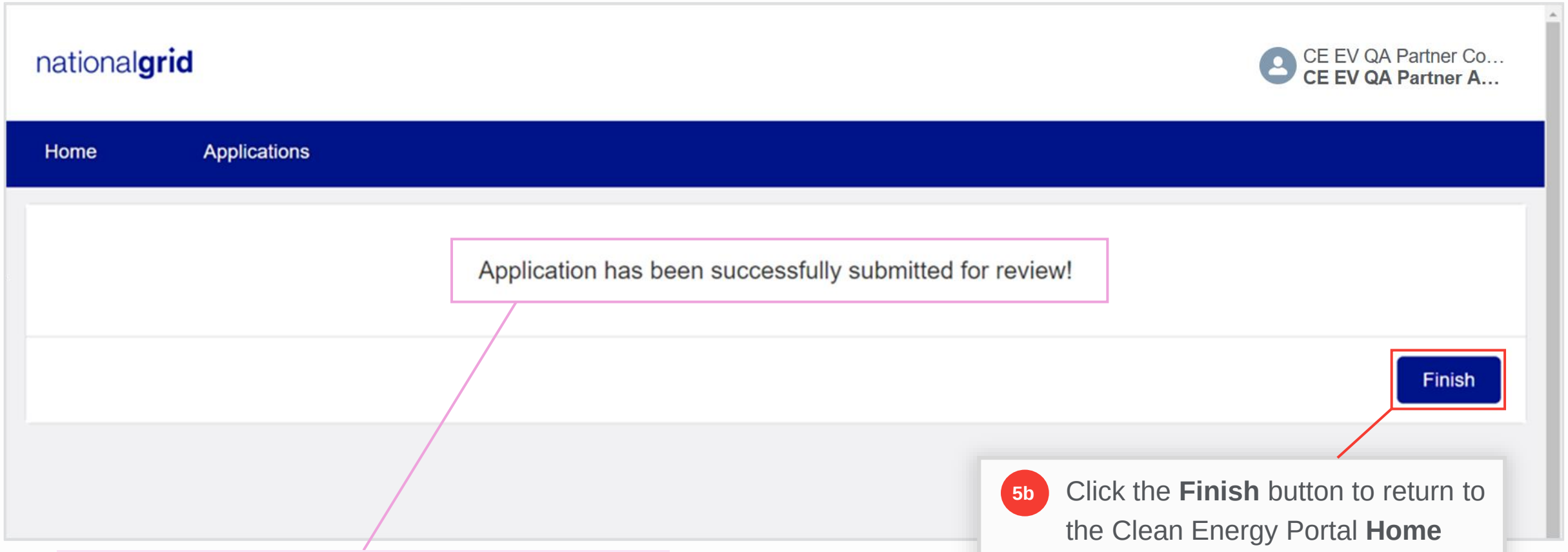
Review and Submission (1/2)

HOW TO EDIT A DRAFT EV APPLICATION



Review and Submission (2/2)

HOW TO EDIT A DRAFT EV APPLICATION



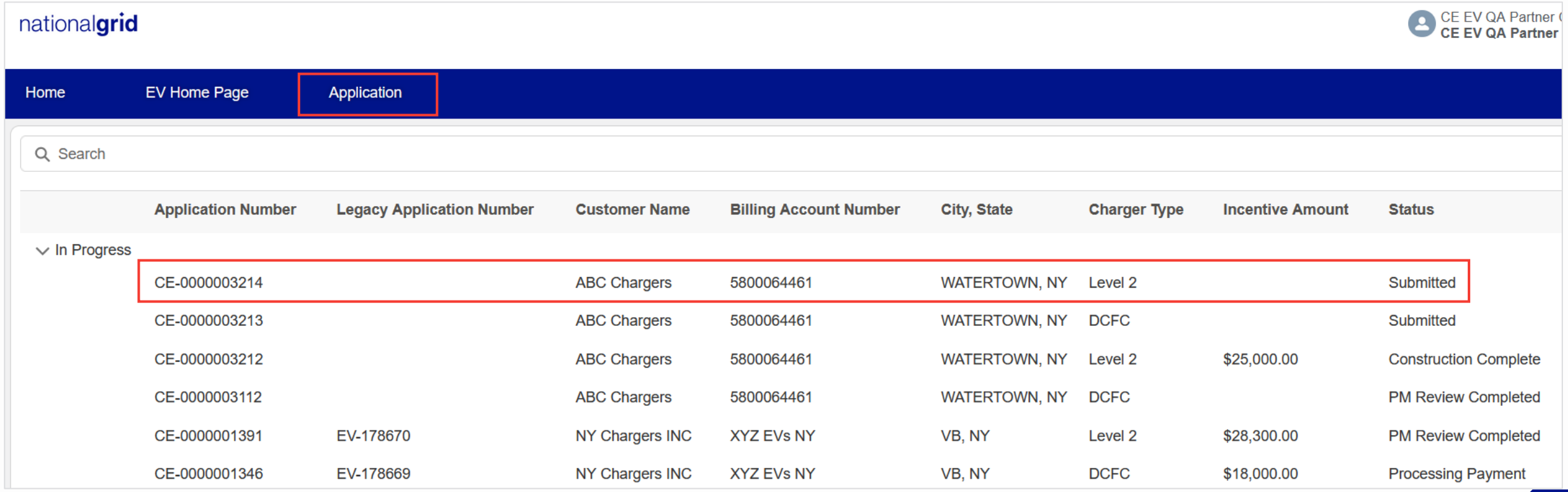
A message will appear that the application has been successfully submitted for review.

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.



	Application Number	Legacy Application Number	Customer Name	Billing Account Number	City, State	Charger Type	Incentive Amount	Status
In Progress								
	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

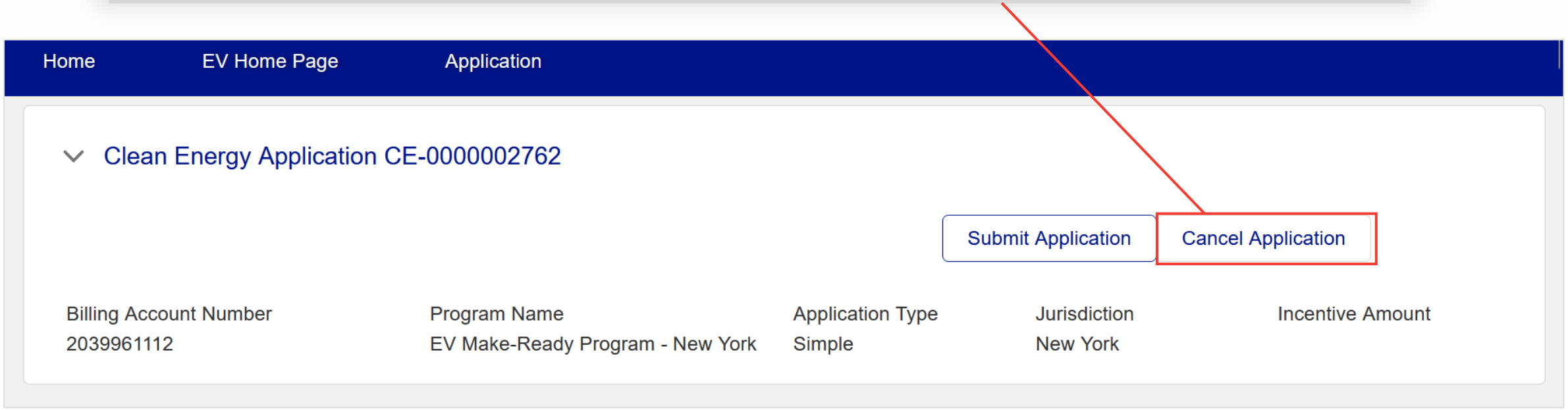
Cancelling the EV Application (1/3)

HOW TO EDIT A DRAFT EV APPLICATION

6a To Cancel the application, select the **Cancel Application** button.

PLEASE NOTE:

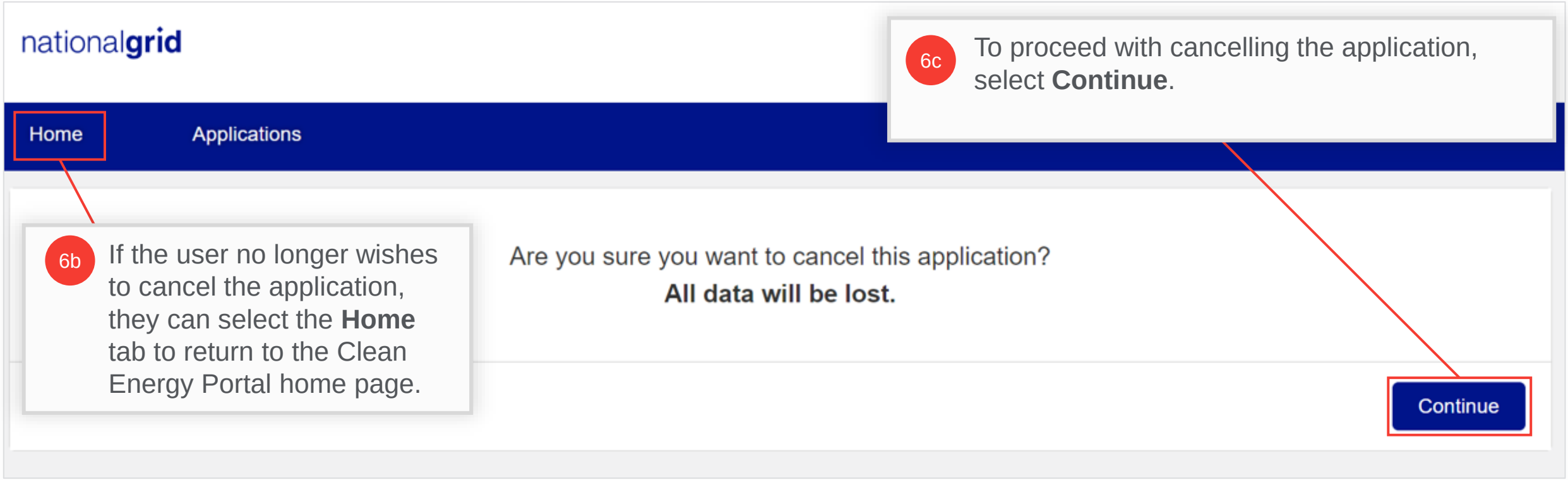
- Cancelling the application will delete the full application, including all progress made & data saved to the application since it was first created.
- Cancelling a newly revised application **WILL NOT** revert it to its previous version.



Cancelling the EV Application (2/3)

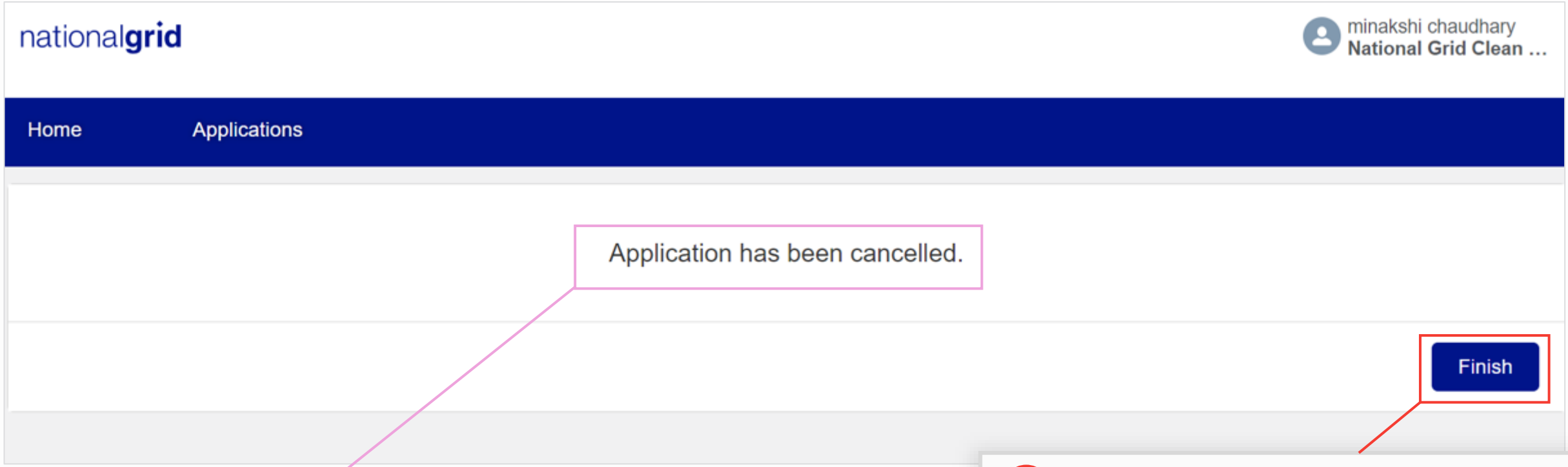
HOW TO EDIT A DRAFT EV APPLICATION

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**.



Review and Submission (3/3)

HOW TO EDIT A DRAFT EV APPLICATION



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