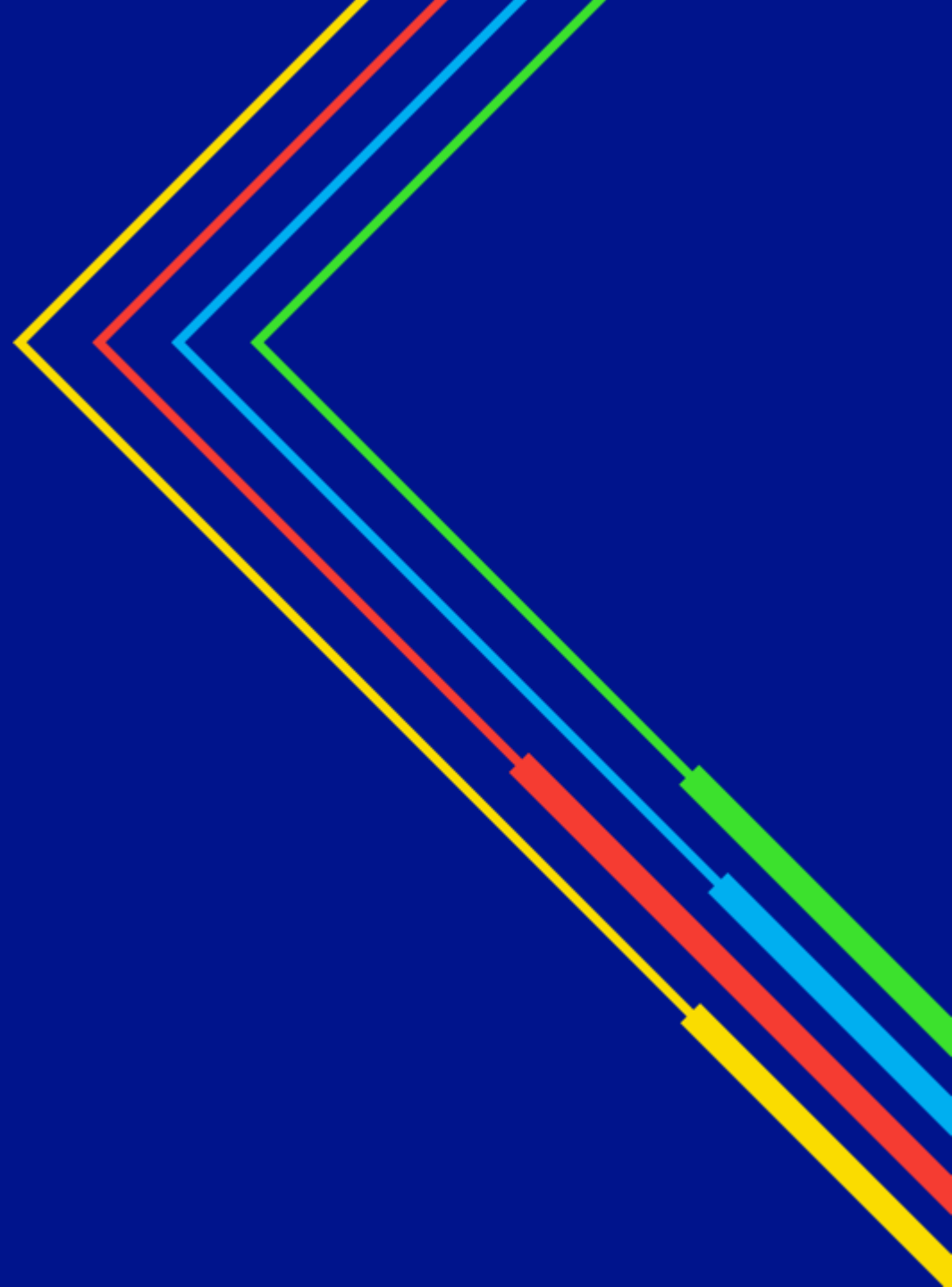# How to View All Your Applications

EV Make-Ready – New York & Massachusetts

November 24, 2023

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How to View All Your Applications

Learning Objectives

This module outlines the steps for viewing all applications created and / or submitted by a user.

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

- EV TRADE PARTNER

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

- View their saved, draft EV applications

- View the EV applications that need additional documents to be uploaded

- View their other EV applications at various stages of lifecycle

- View details of an EV application and track status

Clean Energy Portal – Home Tab Overview

HOW TO VIEW ALL YOUR APPLICATIONS

When a user logs on to the Clean Energy Portal, the homepage of the portal will open.

Clean Energy Portal – Home Tab Overview

HOW TO VIEW ALL YOUR APPLICATIONS

A The Clean Energy Portal **menu bar** will display three tabs:

- **Home**
- **EV Home Page**
- **Application**

In the **Home** and **EV Home Page** tabs:

B All **Action Items** will be listed on the left side of the page.

C To create a new EV Application, navigate to the top-right section and select **Start Application**.

D The lower-right section of the **Home** and **EV Home Page** tabs will display links for all available **Resources**.

4

Clean Energy Portal – Home Tab Overview

HOW TO VIEW ALL YOUR APPLICATIONS

The **Action Items** section will display:

A **Applications requiring additional documents:**

- Users can click the **Review** button to view the list of missing documents and upload them.
- Refer to the module **"How to Upload Missing Documents in an EV Application"** for more details.

B **Draft applications saved by the user:**

- Users can click the **Continue** button and proceed with completing and submitting the applications.
- Refer to the **"How to Edit a Saved EV Application"** module for more details.

Action Items   View All

A
| CE-0000001346 XYZ EVs NY | Documents Needed | Review |

B
CE-0000002761 5800064461	Draft	Continue
CE-0000000830 XYZ EVs NY	Draft	Continue
CE-0000000853 XYZ EVs NY	Draft	Continue

View Other Applications

HOW TO VIEW ALL YOUR APPLICATIONS

1 Select the **Application** tab from the menu bar.

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

Home   EV Home Page   Application

Welcome CE!

Take advantage of programs and incentives to help support the installation of EV charging stations.

Action Items   View All

CE-0000001346   Documents Needed   Review
XYZ EVs NY

EV Charging Station
Make-Ready Program

View Other Applications (cont.)

HOW TO VIEW ALL YOUR APPLICATIONS

The **Application** tab will show all applications submitted by a user (other than draft applications or applications that need documents). The tab will display:

A A search bar to search for applications using **Application Number**, **Legacy Application Number**, **Customer Name**, **Billing Account Number**, **City, State**, **Charger Type**, **Incentive Amount**, or **Status**.

B Application detail columns that allow sorting of records in ascending or descending order by clicking any of the column headers**.**

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| Home | EV Home Page | Application | **A** |

🔍 Search

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	$205,000.00	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
CE-0000000863	EV-178037	NY Chargers INC	EV chargers NY	NY, NY	DCFC	$43,000.00	PM Review
CE-0000000357		NY Chargers INC	NY Billing Account	VB, NY	Level 2	$23,000.00	Application Pre-Approved
CE-0000000353		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2		PM Review
CE-0000000345		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2		Submitted
CE-0000000344		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2		Submitted
∨ Paid							
CE-0000001023		NY Chargers INC	EV chargers NY	NY, NY	DCFC	$205,000.00	Paid
CE-0000000304		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2	$13,000.00	Paid
∨ Rejected							
CE-0000000413		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2		Rejected

View Other Applications (cont.)

HOW TO VIEW ALL YOUR APPLICATIONS

C **In Progress** applications that may be at any stage from **Submitted** to **Processing Payment.**

D Applications that are completed and the incentive is **Paid**.

E Applications that have been **Rejected.**

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Home	EV Home Page	Application

🔍 Search

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	$205,000.00	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
CE-0000000863	EV-178037	NY Chargers INC	EV chargers NY	NY, NY	DCFC	$43,000.00	PM Review
CE-0000000357		NY Chargers INC	NY Billing Account	VB, NY	Level 2	$23,000.00	Application Pre-Approved
CE-0000000353		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2		PM Review
CE-0000000345		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2		Submitted
CE-0000000344		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2		Submitted
⌄ Paid							
CE-0000001023		NY Chargers INC	EV chargers NY	NY, NY	DCFC	$205,000.00	Paid
CE-0000000304		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2	$13,000.00	Paid
⌄ Rejected							
CE-0000000413		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2		Rejected

View Other Applications (cont.)

HOW TO VIEW ALL YOUR APPLICATIONS

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| Home | EV Home Page | |

🔍 Search

ℹ️ Select the arrows next to the **In Progress** and **Paid** sections to expand or collapse the details.

	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
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	CE-0000000353		NY Chargers INC	XYZ EVs NY	VB, NY	Level 2		PM Review

2 Click an application row to view the application details.

Application Details

HOW TO VIEW ALL YOUR APPLICATIONS

The application will be displayed.

On this page, the user can review the application details and monitor its status.

ℹ To go back to the **EV Home Page** or **Application** tab, the user can click the relevant tab on the menu bar.

End of Procedure