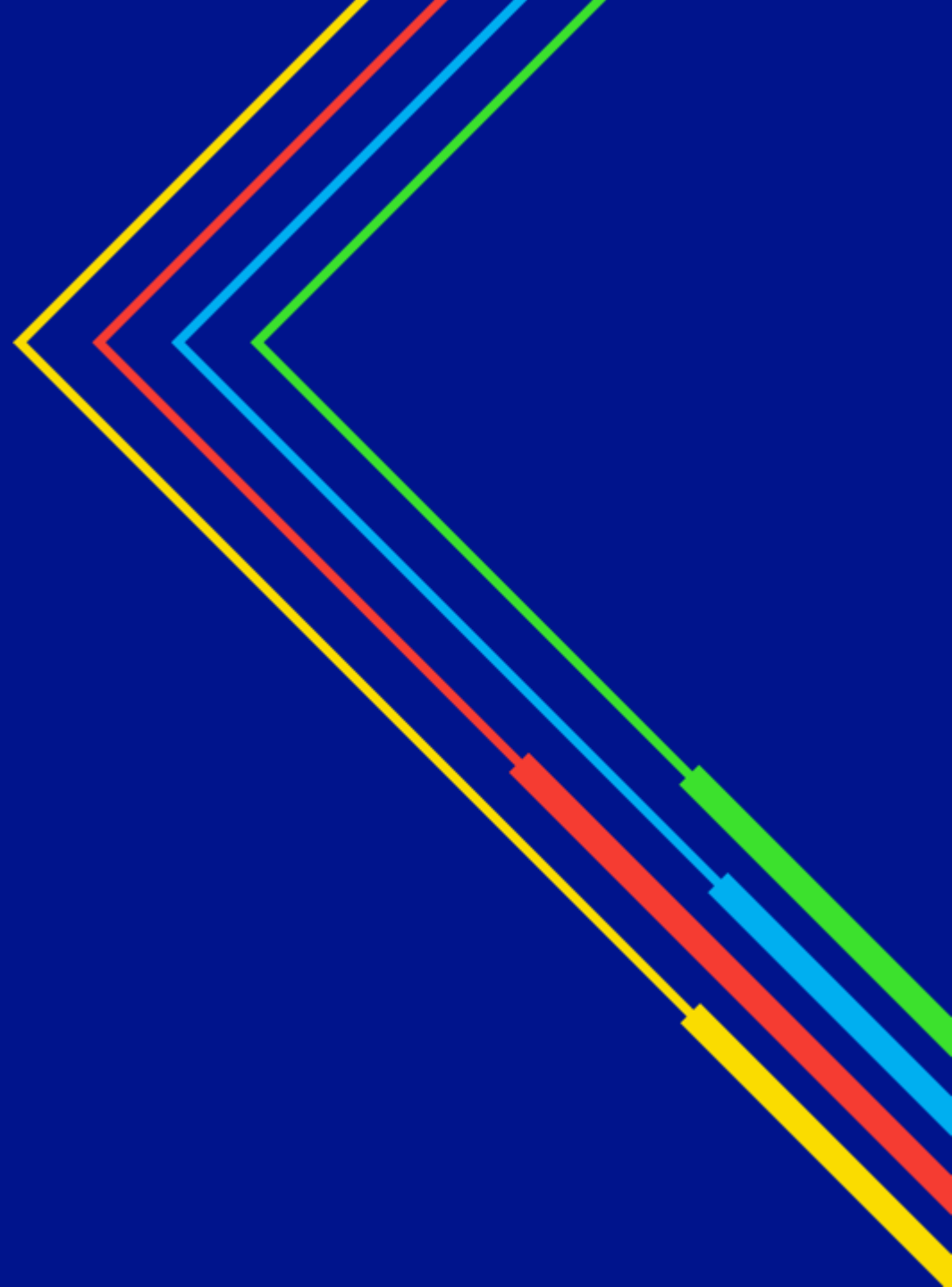


How to View All Your Applications

EV Make-Ready – New York & Massachusetts

November 24, 2023



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.

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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 XYZ EVs NY	Documents Needed	Review
CE-0000002761 5800064461	Draft	Continue

EV Charging Station Make-Ready Program

Start Application

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**.

The screenshot shows the National Grid Clean Energy Portal interface. At the top, the 'nationalgrid' logo is on the left, and a user profile icon with the text 'CE EV QA Partner Co...' and 'CE EV QA Partner Ac...' is on the right. Below the logo is a navigation bar with three tabs: 'Home', 'EV Home Page', and 'Application'. A green box labeled 'A' highlights the 'Application' tab. The main content area features a large image of an electric vehicle charging station with the text 'Welcome CE!' and a sub-header: 'Take advantage of programs and incentives to help support the installation of EV charging stations.' Below this is a table of 'Action Items' with a 'View All' link. A blue box labeled 'B' highlights the table. The table has five rows, each with an ID, a name, a status, and an action button. A pink box labeled 'C' highlights a 'Start Application' button in the top-right section. A purple box labeled 'D' highlights a 'Resources' section in the bottom-right, which lists 'Massachusetts EV Charging Program', 'New York EV Charging Program', and 'Large Business Program'.

Action Items		View All
CE-0000001346 XYZ EVs NY	Documents Needed	Review
CE-0000002761 5800064461	Draft	Continue
CE-0000000830 XYZ EVs NY	Draft	Continue
CE-0000000853 XYZ EVs NY	Draft	Continue
CE-0000000989 EV chargers NY	Draft	Continue

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

View Other Applications

HOW TO VIEW ALL YOUR APPLICATIONS

The screenshot shows the National Grid EV Trade Partner portal. At the top left is the 'nationalgrid' logo. At the top right 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 three tabs: 'Home', 'EV Home Page', and 'Application'. The 'Application' tab is highlighted with a red box. A callout box with a red circle containing the number '1' points to the 'Application' tab and contains the text: '1 Select the **Application** tab from the menu bar.' Below the navigation bar is a large banner area with a background image of an electric vehicle charging station. The banner contains the text: 'Welcome CE!' and 'Take advantage of programs and incentives to help support the installation of EV charging stations.' Below the banner are two main content areas. The left area is titled 'Action Items' and contains a table with one row: 'CE-0000001346', 'XYZ EVs NY', and 'Documents Needed'. There is a 'View All' link and a 'Review' button. The right area is titled 'EV Charging Station Make-Ready Program' and features a plug icon.

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**

Q Search

Application Number	Legacy Application Number	Customer Name	Billing Account Number	City, State	Charger Type	Incentive Amount	Status
<p>▼ In Progress B</p>							
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
<p>▼ Paid</p>							
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
<p>▼ Rejected</p>							
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.

C

D

E

nationalgrid								
Home EV Home Page Application								
Q 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

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

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	\$205,000.00	PM Review Completed
CE-0000001391	EV-178670			VB, NY	Level 2	\$28,300.00	PM Review Completed
CE-0000001346	EV-178669			VB, NY	DCFC	\$18,000.00	Processing Payment
CE-0000000863	EV-178037			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

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.

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

Home
EV Home Page
Application

∨ Clean Energy Application CE-0000003212

Billing Account Number 5800064461	Program Name EV Make-Ready Program - New York	Application Type Simple	Jurisdiction New York	Incentive Amount 25000
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∨

✓

✓

✓

✓

✓

✓

✓

✓

Construc...

Close Ou...

Processi...

Paid

Rejected

Cancelled

◀ ▶

Guidance for Success

Construction has been completed on the site.
Acquiring all required documentation.

Created By
CE EV QA Partner Contact

Customer Name
ABC Chargers

Billing Account Number
5800064461

Submitted Date
11/23/2023

Legacy Application Number

Service Address Zip Code
13601-2750

Files (2)

[Project Estimate](#)
Nov 23, 2023 • 25KB • xlsx

[ABC_Site Drawings](#)
Nov 23, 2023 • 663KB • jpg

End of Procedure

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