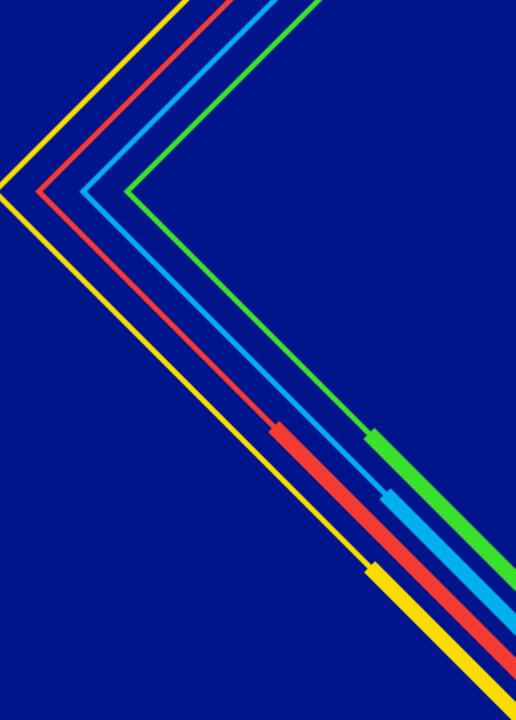
> IT and Digital

# How to Create a New EV Application (Steps 1-5)

EV Make-Ready – New York

January 31, 2023

nationalgrid



### How to Create a New EV Application - New York

### Learning Objectives

This module outlines the steps for creating and submitting a new EV application for the New York region.

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

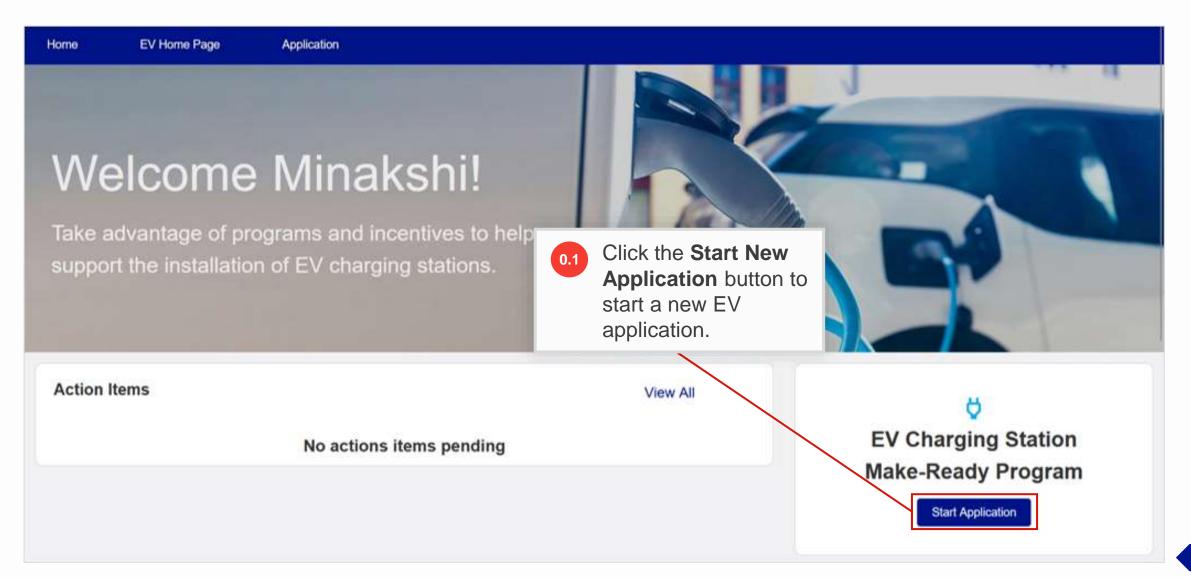
• EV TRADE PARTNER

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

- Create and submit a new EV application for the New York region
- Identify and validate the customer's Site Account Information
- Enter the following details in the EV Application:
  - Electronic power requirements
  - Charging station site information
  - Project contacts



### **National Grid Clean Energy Portal Home Page**



#### HOW TO CREATE A NEW EV APPLICATION - NY

The EV Make-Ready Program
– Identify Site Account page
will appear.

The left pane will display the steps involved in the application creation and submission process. Users will need to complete all steps in order to successfully submit the application.

Home	EV Home Page	pplication
Ste	ps	EV Make-Ready Program - Identify Site Account
0	EV Make-Ready Program - Identif Account	Site New construction, or customers adding a service, will need a complete an Electric Connections Portal Application or call t
0	Required Information	
0	Charging Station Site	* Billing Account Number 000000000
0	Project Contacts	
	Charging Station Equipment	
•	Estimated Project Costs	Customer Service
L		New York Customers Massachusetts C
		Account Inquiries Account Inquiries

#### HOW TO CREATE A NEW EV APPLICATION - NY

As stated, new construction or customers adding a service, will require a temporary billing account number to complete this application with.

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B

To obtain a temporary billing account number, visit the **NY Electric Connections Portal** to either:

- Call support at (800) 642-4272, OR
- Email support at:
   <u>EVNationalGridUNY@nationalgrid</u>
   .com

	ers adding a service, will need a temporary billing account nu an Electric Connections Portal Application or call the numbe	
illing Account Number	* Service Address Zip Code 🕕	
000000000	00000	
ustomer Service B		
New York Customers	Massachusetts Customers	
New York Customers		
B	Massachusetts Customers Account Inquiries Monday-Friday, 7:00am-7:00pm	
New York Customers Account Inquiries	Account Inquiries	
New York Customers Account Inquiries Monday-Friday, 7:00am-7:00pm	Account Inquiries Monday-Friday, 7:00am-7:00pm	

### HOW TO CREATE A NEW EV APPLICATION - NY

Once the billing account number is ready, type the following details:

1.1

- Billing Account Number: In this example, 5800064461
- Service Address Zip Code: In this example, 13601

Note that the **Billing Account Number** will always be a 10-digit number.

The **Service Address Zip Code** will be the location of the EV charging station, which may differ from the Customer's Billing Account Address.

300 °	adding a service, will need a temporary billing ad ns Portal Application or call the number below.	ccount number for this application. Please
Billing Account Number	* Service Address Zip Co	de 🚯
5800064461	13601	
Customer Service		
Sustomer Service	Massachusetts Customers	1.2 Enter the appropriate
New York Customers		1.2 Enter the appropriate values, and then click
	Massachusetts Customers Account Inquiries Monday-Friday, 7:00am-7:00pm	values, and then clicl
New York Customers Account Inquiries	Account Inquiries	
New York Customers Account Inquiries Monday-Friday, 7:00am-7:00pm	Account Inquiries Monday-Friday, 7:00am-7:00pm	values, and then click

#### HOW TO CREATE A NEW EV APPLICATION - NY

Upon clicking Next, the user will receive an error message if:

A	The required fields were left blank. To resolve, enter the customer's	
	Billing Account Number and Service Address Zip Code,	
	respectively.	

* Billing Account Number	* Service Address Zip Code 1	
00000000	00000	
Error: Billing Account Number is required.	Error: Service Address Zip Code is required.	

The information entered does not match an electric billing account (number) or/and a service address zip code in National Grid's records. To resolve, enter the correct **Billing Account Number** and **Service Address Zip Code**. If the user is still not able to resolve it, they can contact Customer Service for support.

* Billing Account Number	* Service Address Zip Code	
9876543211	02108	
The information entered does not match an electric billing account		
(number) or/and a service address zip code in our records. Please		
review for errors or contact Customer Service for support.		

#### HOW TO CREATE A NEW EV APPLICATION - NY

Upon clicking **Next**, the user will receive an error message if:

The length of the <b>Billing Account Number</b> that more than 10 digits. To resolve, enter the correct	
* Billing Account Number	* Service Address Zip Code
98765432110	02108
Billing Account Number should not be more	than 10 digits.
	The length of the <b>Service Address Zip Code</b> that the user entered is more than 5 digits. To resolve, enter the correct 5-digit zip code.
Billing Account Number	* Service Address Zip Code 🕕
3766000161	021080
	Service Address Zip Code should not be more than 5 digits.

#### HOW TO CREATE A NEW EV APPLICATION - NY

13601	
Massachusetts Customers	
Account Inquiries Monday-Friday, 7:00am-7:00pm (800) 322-3223	1.3 Once the required details have been entered, proceed by selecting <b>Next</b> .
Create New Work Order MA Electric Connections Portal	
	Massachusetts Customers Account Inquiries Monday-Friday, 7:00am-7:00pm (800) 322-3223 Create New Work Order

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# **Step 2: Required Information**

### HOW TO CREATE A NEW EV APPLICATION - NY

The **Required Information** screen will appear.

The Navigation view will display icons to indicate the status of each step. In this example:

- Step 1 is shown as Complete with a green check
- Step 2 is shown as In
   Progress with a blue ring
- Step 3 is not yet started with a closed grey circle





Required Information

- Electric Power Requirements
- Charging Station Site
- Project Contacts
- Charging Station Equipment
- Estimated Project Costs

This script has been automatically saved, in order to resur

### **Required Information**

We want you to feel prepared. Do you have the nec encourage you to review all requirements. **Review**.

### Work Request Number

While not all applications require a new or upgraded service, larger site locations including those with DC chargers may require it. To start the work request, v Electric Connections Portal

### Site Drawings

Your drawings should include...

- Overhead satellite image of site
- · Location of electrical panel serving the charging

### **Step 2: Required Information (cont.)**

#### HOW TO CREATE A NEW EV APPLICATION - NY

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l	L		

### Review All Application Requirements details all the

necessary information that users will need to complete in order to submit the application.

B Users can use the Electric Connections Portal link to obtain a new Work Request Number, if needed. This script has been automatically saved, in order to resume in the future: Copy the link or Email me the link

### **Required Information**

We want you to feel prepared. Do you have the necessary information to continue this application? We strongly encourage you to review all requirements. Review All Application Requirements

#### Work Request Number



While not all applications require a new or upgraded service, larger site locations including those with DCFC chargers may require it. To start the work request, visit:

#### **Electric Connections Portal**



#### Site Drawings

Your drawings should include...

- · Overhead satellite image of site
- · Location of electrical panel serving the charging station
- · Proposed location of charging station
- · Proposed location of electrical infrastructure, including distance to charging station
- · Notes and other information to assist with evaluating this proposal

### **Step 2: Required Information**

#### HOW TO CREATE A NEW EV APPLICATION - NY

Users can also use the **View Template** link to download the **Project Estimate** template.

В

From any screen in the application, users can click **Cancel** to cancel the application. Please note that if a user selects **Cancel** in this step, they will need to re-validate the site account when they return to create the application in Step 1.

### **Project Estimate**

The NY EV-MRP requires a pre-project estimate of the make-ready and charging station related costs. Please view and "download" the linked "Project Estimate Template" to aid in the application and submittal process.

2.1 Af

After reviewing the application requirements, select **Begin Application**.

B Cancel

### HOW TO CREATE A NEW EV APPLICATION - NY

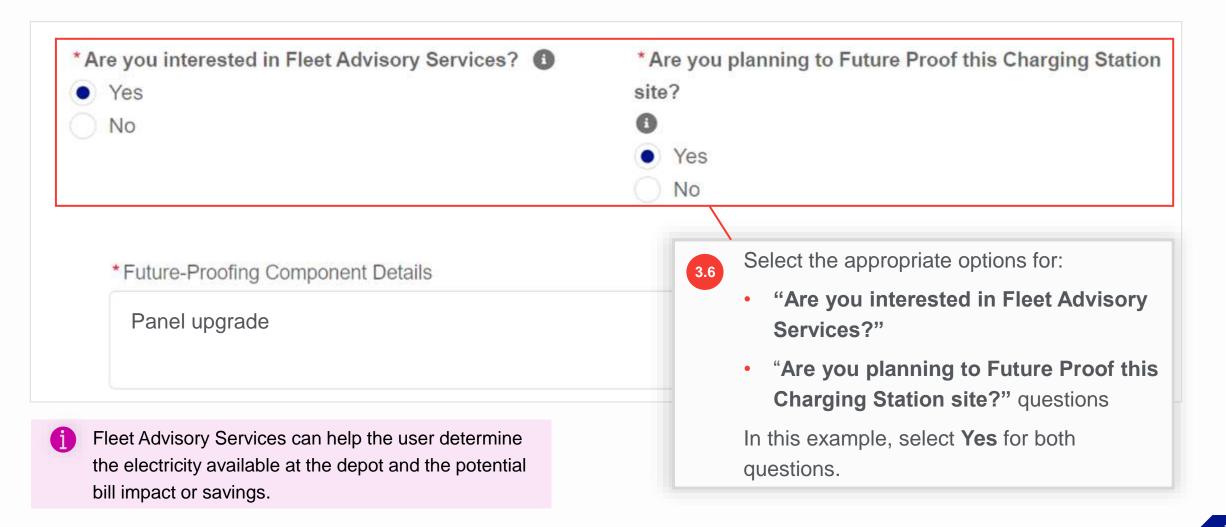
The Electric Power Requirements screen will appear.

Ste	This script has been automatically saved, in order to resume in EV Make-Ready Program - Identify Site Account This script has been automatically saved, in order to resume in Electric Power Requirements ABC Chargers		<ul> <li>3.2 After selecting Yes, a second field titled,</li> <li>"What is your Work Request Number?" appears on the application.</li> <li>Enter the Work Request Number, which will start with "3" and consist of 8 total digits.</li> </ul>		
0	Required Information	Please request a Work Request Number to comp		plete th	e application.
ò	Electric Power Requirements				
	Charging Station Site	* Is there a Work Request Number for this project? (1) • Yes No			at is your Work Request Number? 123456
	Project Contacts	to re Location		* Pov	wer Source Type
3.1	Indicate if there is a <b>Work</b> <b>Number</b> for the project.	« Request		20	8V Three Phase
	In this example, select Ye	es.	I Location		ctrical Panel Type
1			nel outside in front of the building	EX	isting

30123456	
* Power Source Type	
208V Three Phase	
* Electrical Panel Type	
Existing	

<ul> <li>Is there a Work Request Number for this project?</li> <li>Yes</li> <li>No</li> </ul>		*What is your Work Request Number? 30123456		
Pole# 434		208V Three Phase		
* Electric Panel Location Electric Panel outside in fro	nt of the building	There will be three options available in the F Source Type list: *Power Source Type	Power	
Other Requirements 23KV service 3 phase		208V Three Phase	•	
3.3	Enter the <b>Power Source</b>	Clear	•	
	Location and select the Power	208V Three Phase		
	Source Type from the drop- down list.	- 480V Three Phase		
		120/240V Single Phase	-	

3.4 Enter the Electric Panel Location and Electric Panel Type from the drop-down list.	*Power Source Type 208V Three Phase
* Electric Panel Location	* Electrical Panel Type
Electric Panel outside in front of the building	Existing
Other Requirements 23KV service 3 phase	There will be two options available in the <b>Electrical Panel Type</b> list:
	*Electrical Panel Type Existing
3.5 Enter any additional comments in the <b>Other</b> <b>Requirements</b> field, if applicable.	Clear
The <b>Other Requirements</b> field enables a user to enter additional information about the application such as multiple work requests a single request for both DCFC and Level 2 chargers, and so on.	



- <sup>3.7</sup> After selecting **Yes** for **"Are you planning to Future Proof this Charging Station site?"**, the following fields appear to request additional information on Future-Proofing activities:
  - Future-Proofing Component Details
  - How many additional ports are being accommodated?
  - What is the time frame for additional future ports? (months)
  - What is the total cost of all future-proofing activities including material and labor?

Panel upgrade		
* How many additional ports are being accommodated?	* What is the time frame for additional future por	// rts? (m
4	3-6 months	

#### HOW TO CREATE A NEW EV APPLICATION - NY



At this stage, users can cancel or save their application for later.

В

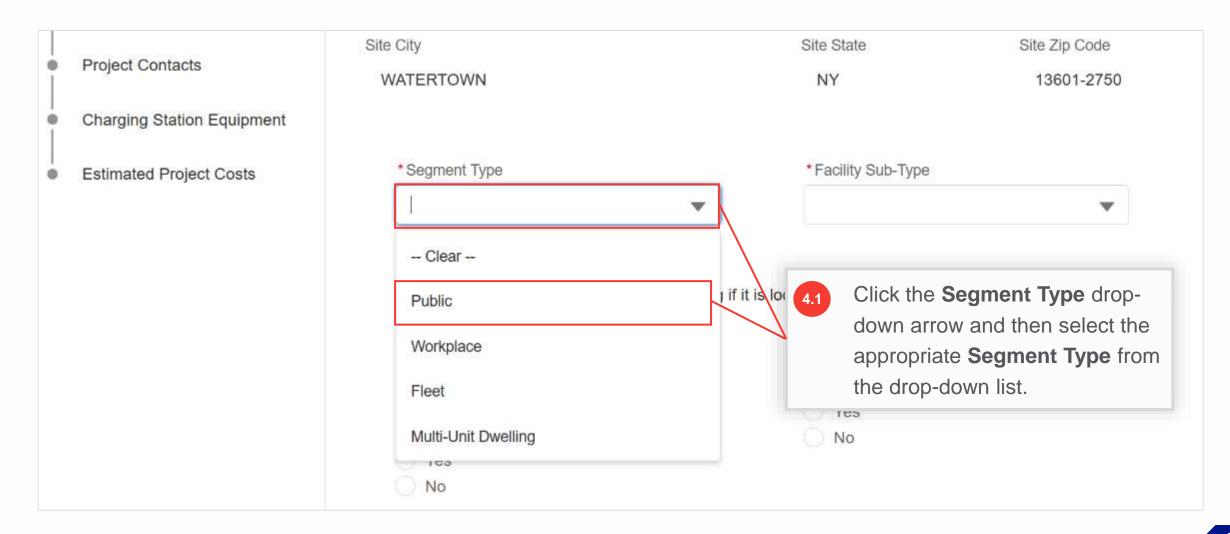
Users can also select **Previous** to view the prior screen.

*Future-Proofing Component Details	
Panel upgrade	
	li.
* How many additional ports are being accommodated?	* What is the time frame for additional future ports? (m
4	3-6 months
\$ 6,000.00 Cancel Save for later	B Previous Next
Α	
	3.8 Enter the appropriate values, and then select <b>Next</b> .

#### HOW TO CREATE A NEW EV APPLICATION - NY

The Charging Station Site screen will appear. The Facility Type, Site Street, Site City, Site State, and Site Zip Code fields will be prefilled based on the billing account information the user provided in Step 1.

Ste	eps	This script has been automatically saved, in order to resume in the future: Copy the link or Email me the link		
0	EV Make-Ready Program - Identify Site Account	Charging Station Site ABC Chargers		
0	Required Information	Tell us about the charging station site. Please provide Site Drawings.		
0	Electric Power Requirements	Facility Type	Site Street	
0	Charging Station Site	Fast Food		
•	Project Contacts	Site City WATERTOWN	Site State NY	Site Zip Code 13601-2750



Estimated Project Costs	*Segment Type		* Facility Sub-Type	
	Public	•	1	•
			Clear	
	Vour project may qualify for additional fur		<sup>t</sup> Retail	bility
	4.2 Click the <b>Facility Sub-Type</b> of down arrow and then select t	. /	Leisure Destination	
	appropriate Facility Sub-Typ	be	Parking Garage / Lot	
	from the drop-down list.		Municipal/Government	
	O Yes O No		Educational	
			Medical	
	Attachments Site Drawings should include:		Office	
	Overhead satellite image of site (ex: Goo	ode Mans)		

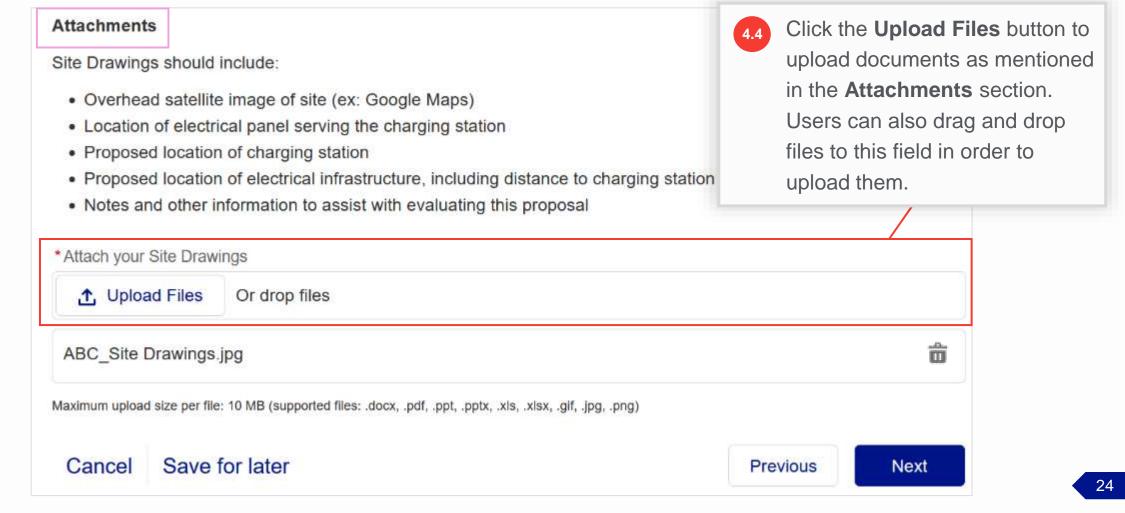
The project may qualify for

# **Step 4: Charging Station Site**

* Segment Type	* Facility Sub-Type	additional funding if it is located in a disadvantaged
Public	Parking Garage / Lot	the eligibility map by clicki the <b>View Eligibility Map</b> l
Your project may qualify for additional funding i * Is this site in a disadvantaged community? ( Yes No		
<b>tachments</b> te Drawings should include: • Overhead satellite image of site (ex: Google Ma	"Is this site publicly a	accessible?" questions.

### HOW TO CREATE A NEW EV APPLICATION - NY

Users can also upload site drawings on this screen. The site drawing requirements will be explained in the **Attachments** section.



It is mandatory to upload the Site

To delete an uploaded attachment,

click the **Delete** (m) icon.

Plan attachments.

# **Step 4: Charging Station Site**

#### HOW TO CREATE A NEW EV APPLICATION - NY

#### Attachments

Site Drawings should include:

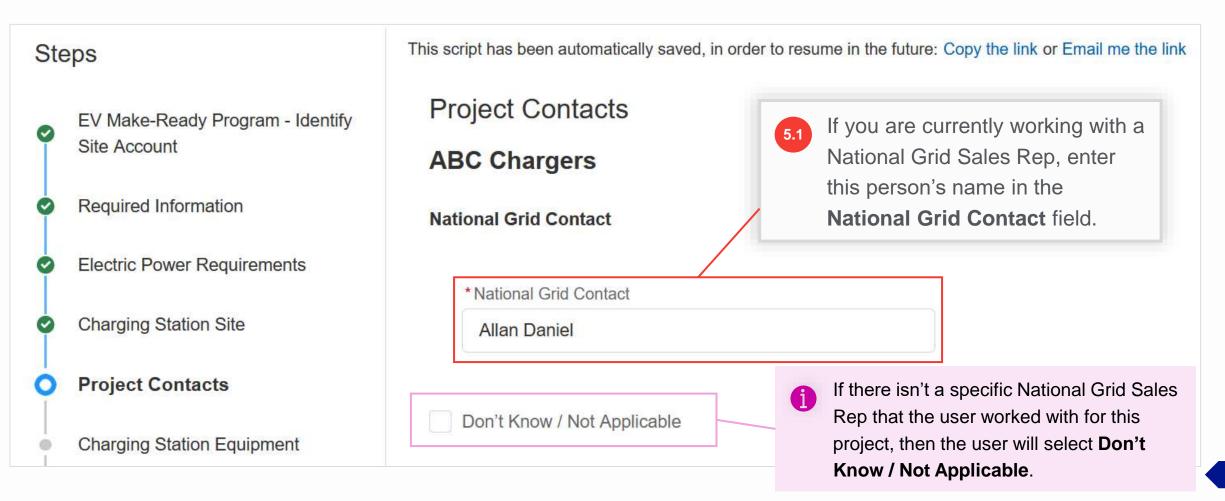
- · Overhead satellite image of site (ex: Google Maps)
- Location of electrical panel serving the charging station
- Proposed location of charging station
- Proposed location of electrical infrastructure, including distance to charging station
- · Notes and other information to assist with evaluating this proposal

\*Attach your Site Drawings

### **Step 5: Project Contacts**

#### HOW TO CREATE A NEW EV APPLICATION - NY

The **Project Contacts** screen will appear. It allows users to enter the contact information of the National Grid Contact and the Facility Project Contact.



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### **Step 5: Project Contacts**

#### HOW TO CREATE A NEW EV APPLICATION - NY

The **Facility Project Contact** is a designated person at the location that National Grid can contact regarding the electric infrastructure upgrades.

The Facility Project Contact will be the recipient of all communications from National Grid such as the Approval Package including the	National Grid Contact • National Grid Contact Allan Daniel	Contact E	Facility Project Email and Facility rimary Phone.
Approval Letter, Terms and Conditions, Incentive Assignment Form, Project Closeout Checklist, and	Don't Know / Not Applicable Facility Project Contact		
Project Estimate. The Facility Project Contact	Let's connect the Customer Facility Contact (the * Facility Project Contact Email	nat is authorized to sign on behalf of the * Facility Project Primary P	
will complete the incentive assignment form and sign the	rbrown@abcgroup.com	8887776669	
terms and conditions on behalf of the customer.	Cancel Save for later	5.3 Click Next.	Previous

### **Step 5: Project Contacts**

#### HOW TO CREATE A NEW EV APPLICATION - NY

If the information entered matches an existing contact in National Grid's records, the contact will be linked to the application and the billing account (if it isn't already) and the application will proceed to Step 6. If the Facility Contact details that the user entered do not match any contact, the **Create Project Contact** screen will appear where the user will need to enter the contact details to create a new contact. In such cases, complete Step 5 as shown in the next slide.

Ste	eps	This script has been automatically saved, in order to rest	ume in the future: Copy the link or Email me the link
0	EV Make-Ready Program - Identify Site Account	Create Project Contact ABC Chargers	
0	Required Information	We couldn't find this person in our reco	ds. Please check your spelling and click on the Previous button to validate again. If
0	Electric Power Requirements	not, add a new facility contact.	
0	Charging Station Site	Facility Project Contact Email	Facility Project Primary Phone
ĭ	onarging station site	rbrown@abcgroup.com	8887776669
0	Project Contacts	* Contact First Name	*Contact Last Name
0	Create Project Contact	Ronald	Brown
Ť		* Contact Title	* Contact Street Address
-	Charging Station Equipment	Facilities Manager	43rd St 7th Ave

### **Step 5: Project Contacts**

Facility Project Contact Email rbrown@abcgroup.com	Facility Project Primary Ph	none 5.4 Enter the contact details.
Contact First Name	* Contact Last Name	
Ronald	Brown	
Contact Title	* Contact Street Address	
Facilities Manager	43rd St 7th Ave	
Contact City	* Contact State	* Contact Zip Code
Watertown	NY	13601
Watertown Cancel Save for later	NY	13601 Previous Next