

# How to Create a New EV Application (Steps 6-8)

EV Make-Ready – Massachusetts

November 23, 2023



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



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

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

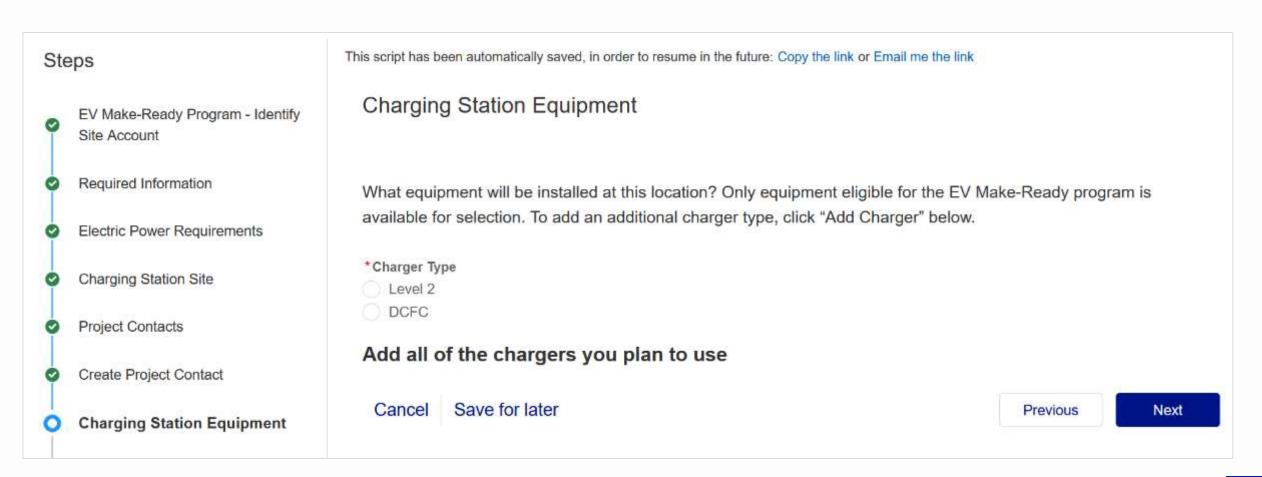
• EV TRADE PARTNER

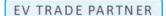
#### By the end of this module, users will be able to:

- Create and submit a new EV application for the Massachusetts region
- Identify and validate the customer's Site Account Information
- Enter the following details in the EV Application:
  - Charging station equipment information
  - Third-party funding (if applicable)
  - Cost and payment information
- Attach supporting documents to the application

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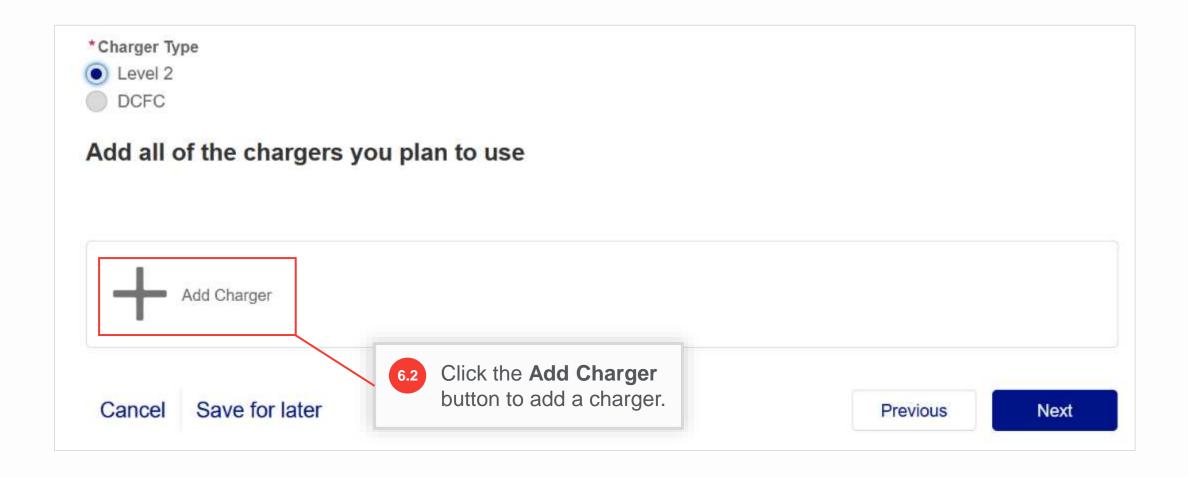
The **Charging Station Equipment** screen will appear. This screen allows users to enter the details of the equipment that will be installed at this location.





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Upon selecting the **Charger Type**, the **Add Charger** button will become available.



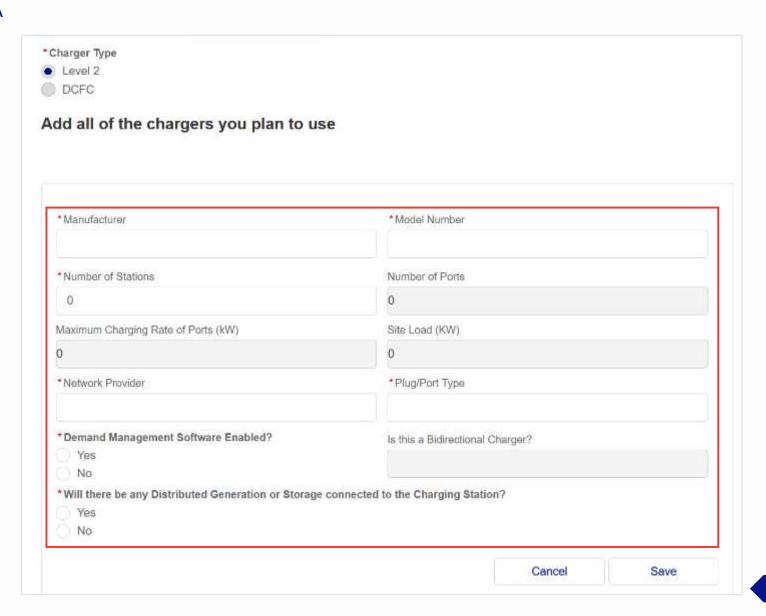


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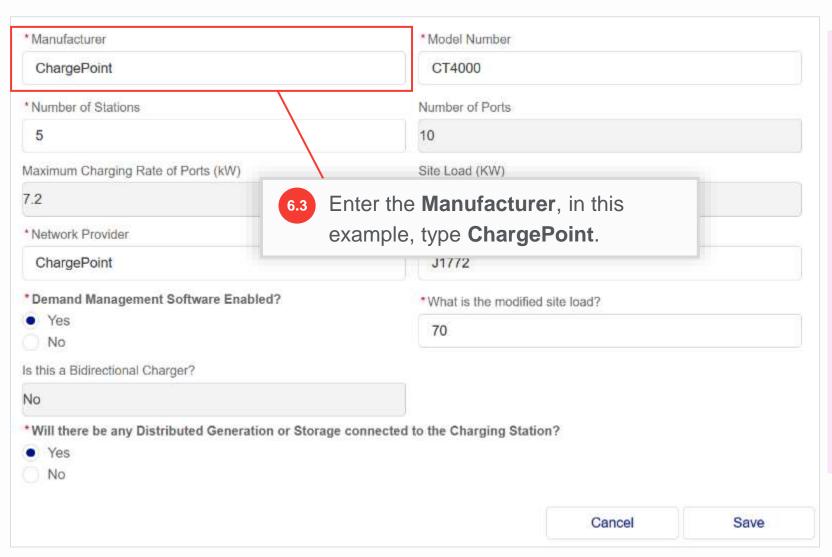
After selecting **Add Charger** in Step 6.2, additional fields will appear. Users will need to enter and save the charger details here.

Note that only chargers eligible for the EV Make-Ready Program will be available for selection. If the user enters any other charger (Manufacturer / Model Number, etc.), it will need approval from the Program Manager. Users can add as many different chargers or models as they plan on installing.

**Note:** If there are multiple chargers with different access levels, for example, one is private and another public, users must create separate applications for public and private chargers.



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The Manufacturer field is a type-ahead field, which means, it will show a list of matching values to select as text is entered in this field.

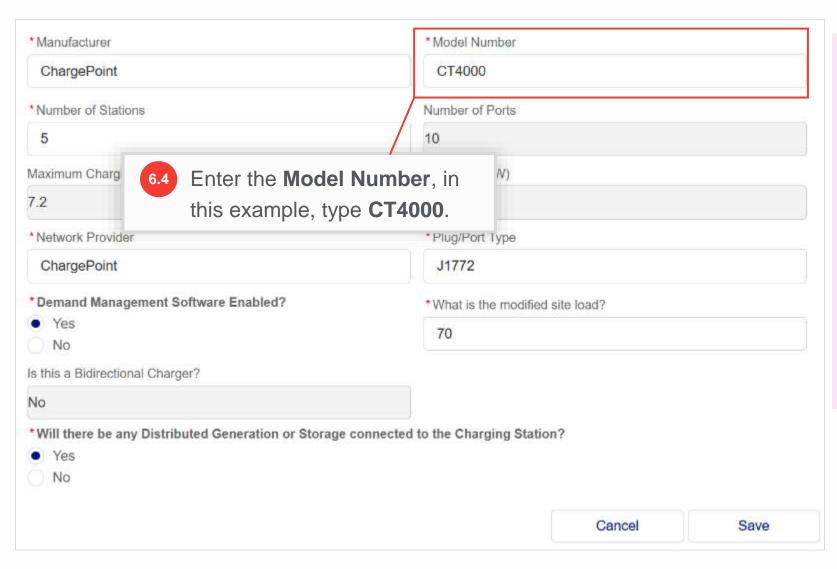
The available values displayed in the Manufacturer field will depend on the Charger Type (Level 2 or DCFC) selected

in Step 6.1





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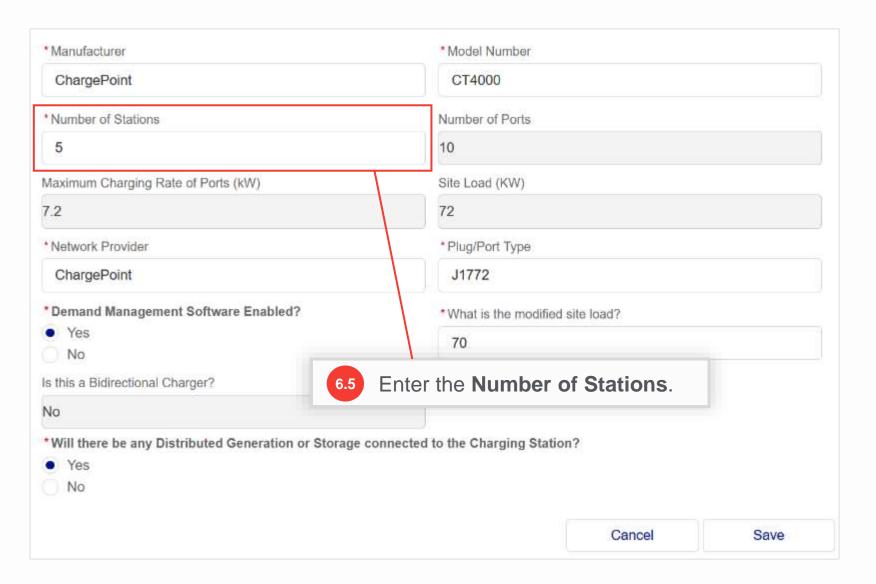
The Model Number field is also a typeahead field. The user can start typing and
then select the required value instead of
typing through to the end. The value in the
Model Number field will depend on the
Manufacturer field.

\*Model Number

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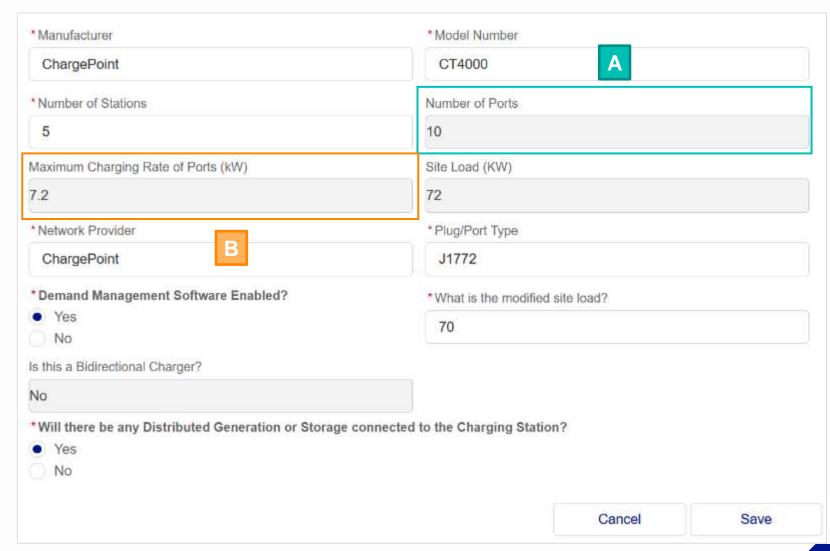
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- The Number of Ports field will auto-populate based on the Model Number and Number of Stations.
- The Maximum Charging Rate of Ports (kW) field will also auto-populate based on the Model Number.
- i Each model has a certain number of ports (1, 2, etc.).

  The # of ports in a model multiplied by the # of stations is the value of the Number of Ports field.



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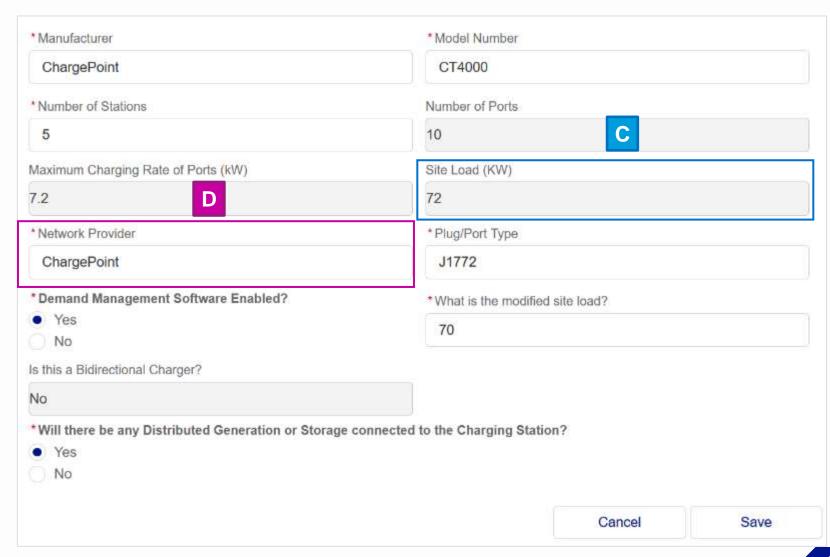
- The Site Load (kW) field will also be auto-populated. The value will be calculated as:

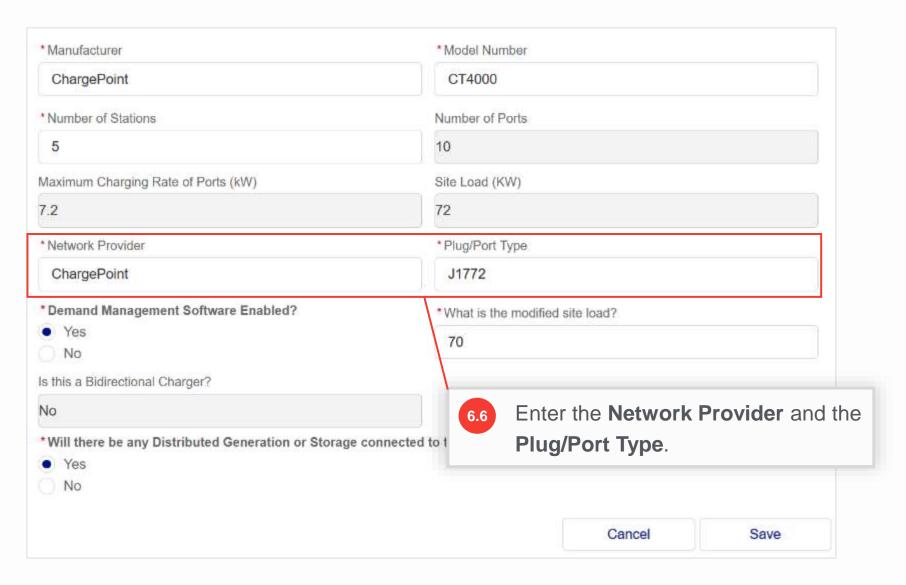
  (Number of Ports) x (Maximum Charging Rate of Ports (kW)).
- The **Network Provider** field is a type-ahead field. Values in this field will be dependent on the **Model Number** field.

If the user does not use any suggested value and enters

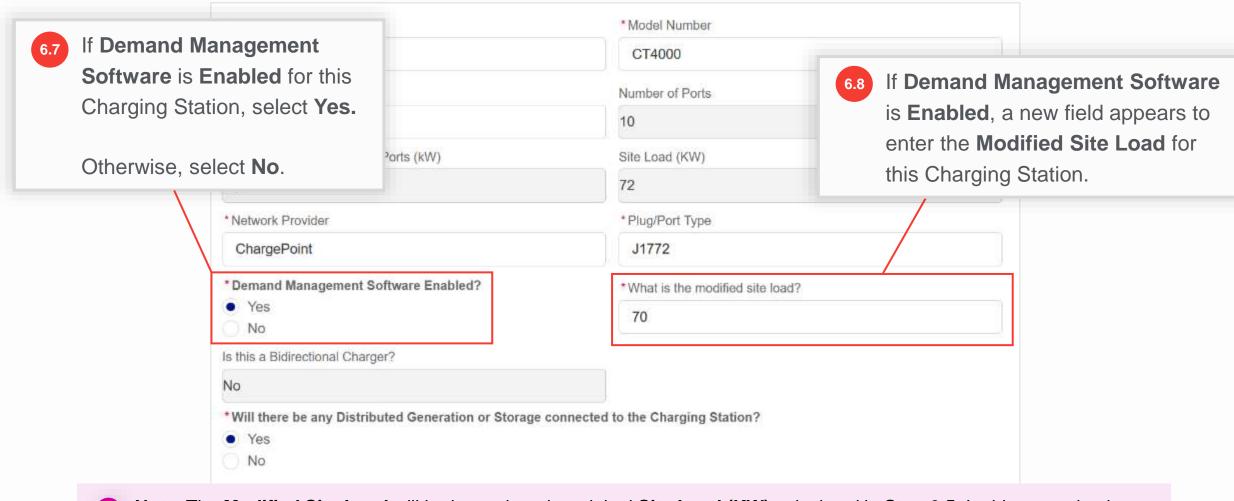
Other as the Network Provider, an additional field, Other

Provider will appear, which they need to fill in.

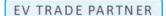


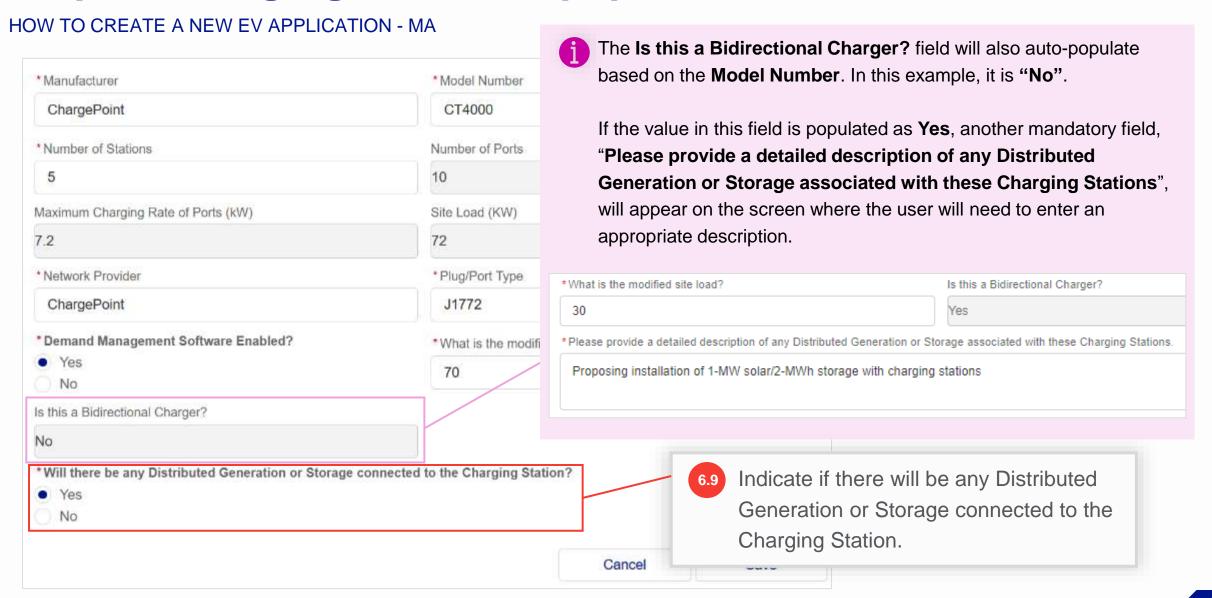


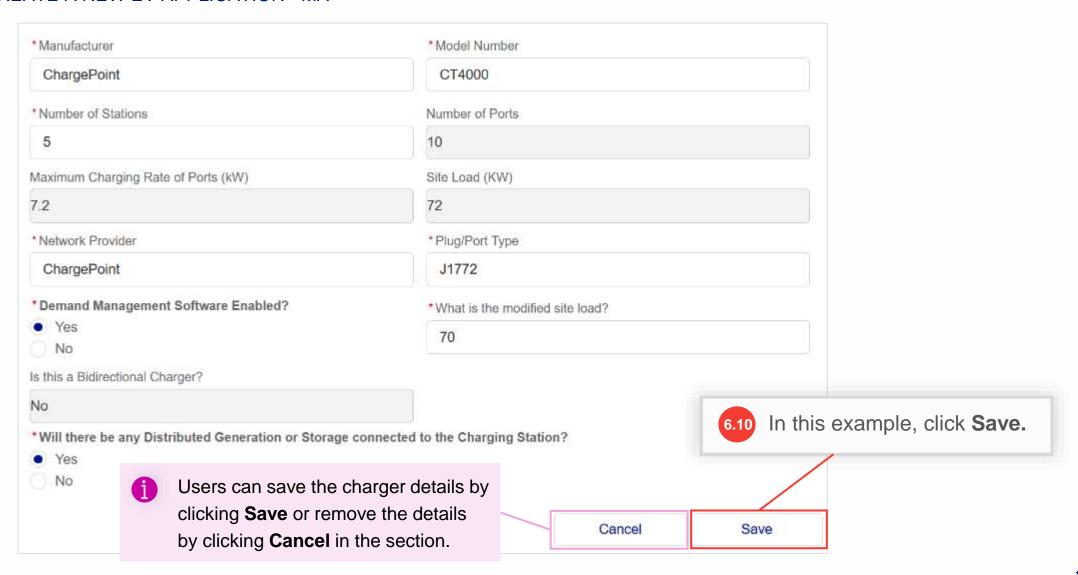
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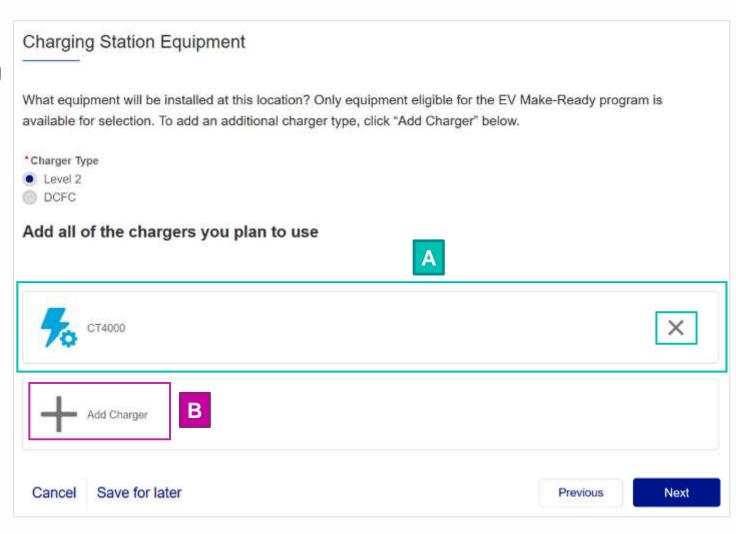
Note: The Modified Site Load will be lower than the original Site Load (KW) calculated in Step 6.5. In this example, the original Site Load (KW) is 72, whereas the Modified Site Load is 70.



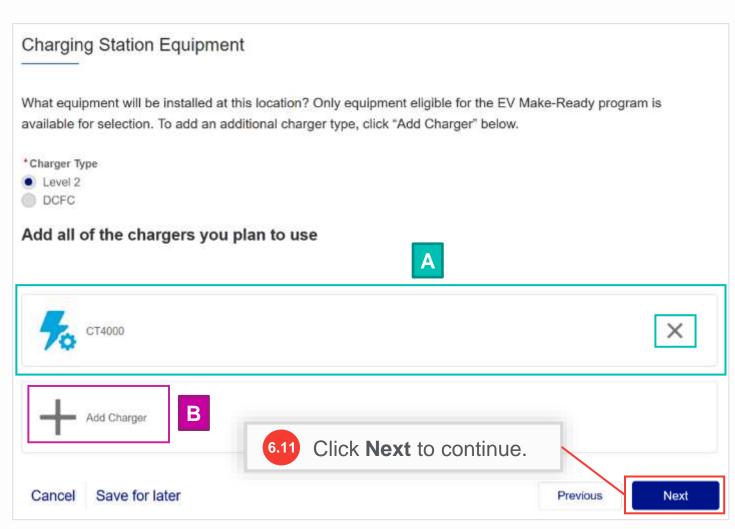




- The charger details will be saved and will appear as a collapsed tab showing the lightning and gear icon and the Model Number.
  - Users can click the tab to view the details.
     Users can also delete these details by clicking the x icon.
- Users can add as many chargers from different manufacturers or models as they plan on installing by clicking the **Add Charger** button again. The **Charger Type**, however, must remain the same throughout the application.
  - For example, only Level 2 Chargers can be added to this application moving forward.
  - To add a DCFC Charger Type, users must create a separate EV application.

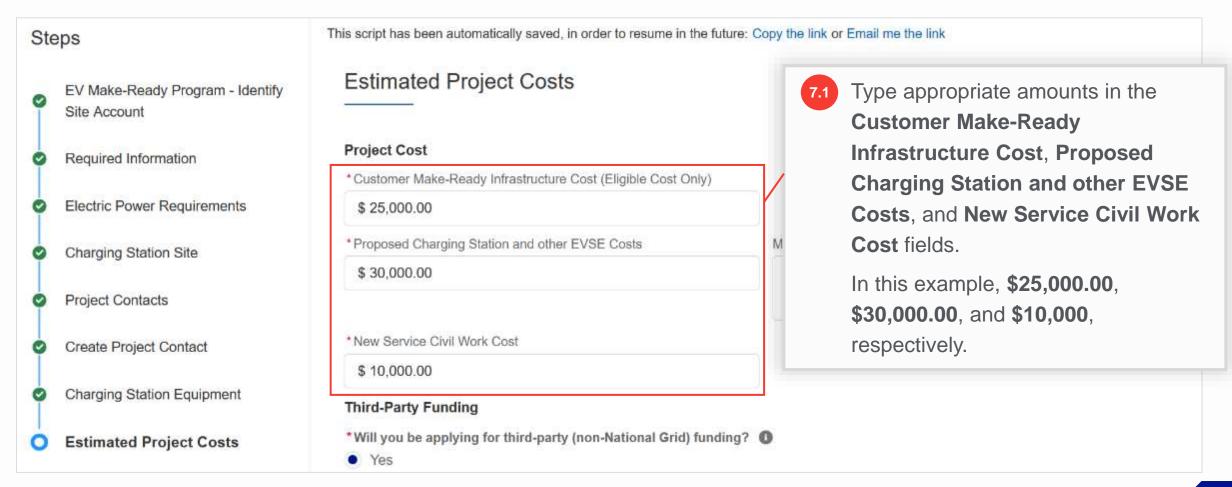


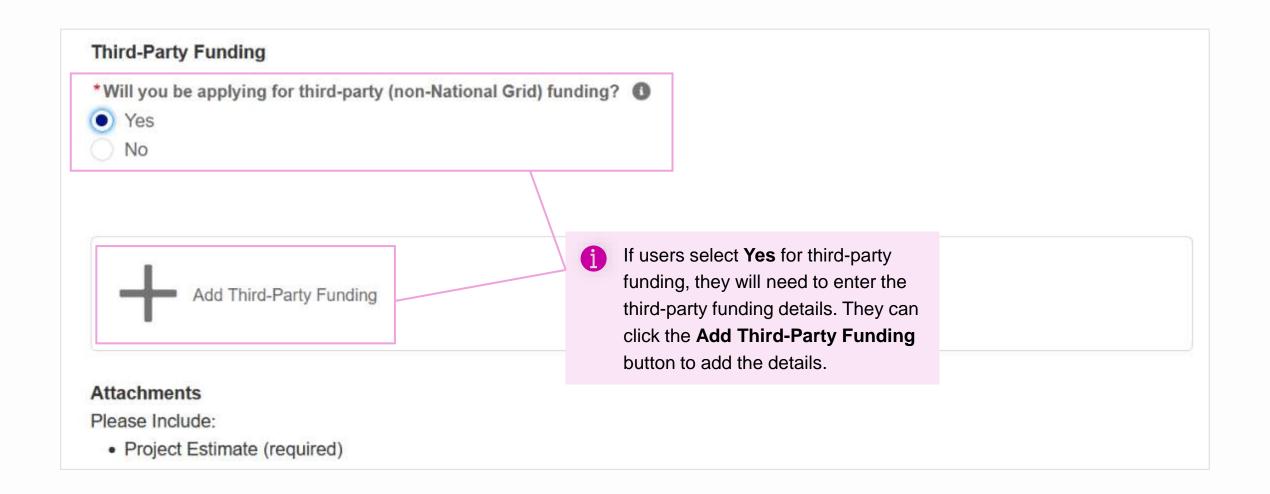
- The charger details will be saved and will appear as a collapsed tab showing the lightning and gear icon and the Model Number.
  - Users can click the tab to view the details.
     Users can also delete these details by clicking the x icon.
- Users can add as many chargers from different manufacturers or models as they plan on installing by clicking the **Add Charger** button again. The **Charger Type**, however, must remain the same throughout the application.
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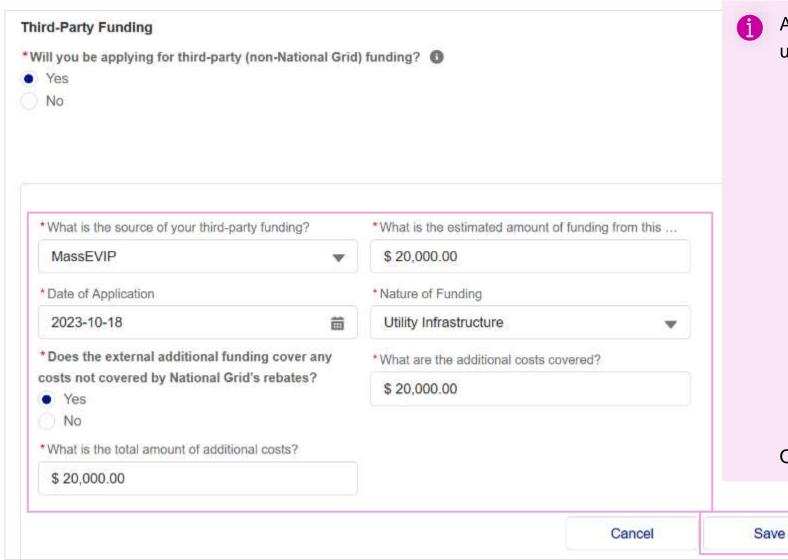
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The Estimated Project Costs screen will appear. Here, the user can enter the details of the project cost and third-party funding.





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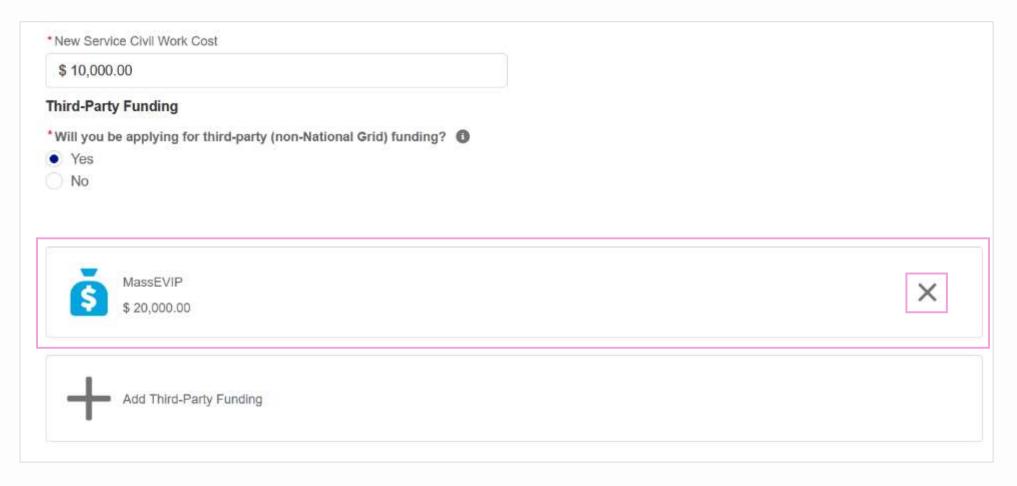
- After selecting the **Add Third-Party Funding** button, users will need to enter the following details:
  - "What is the source of your third-party funding?"
  - "What is the estimated amount of funding from this source?"
  - Date of Application
  - Nature of Funding
  - "Does the external additional funding cover any costs not covered by National Grid's rebates?"
  - "What are the additional costs covered?"
  - "What is the total amount of additional costs?"

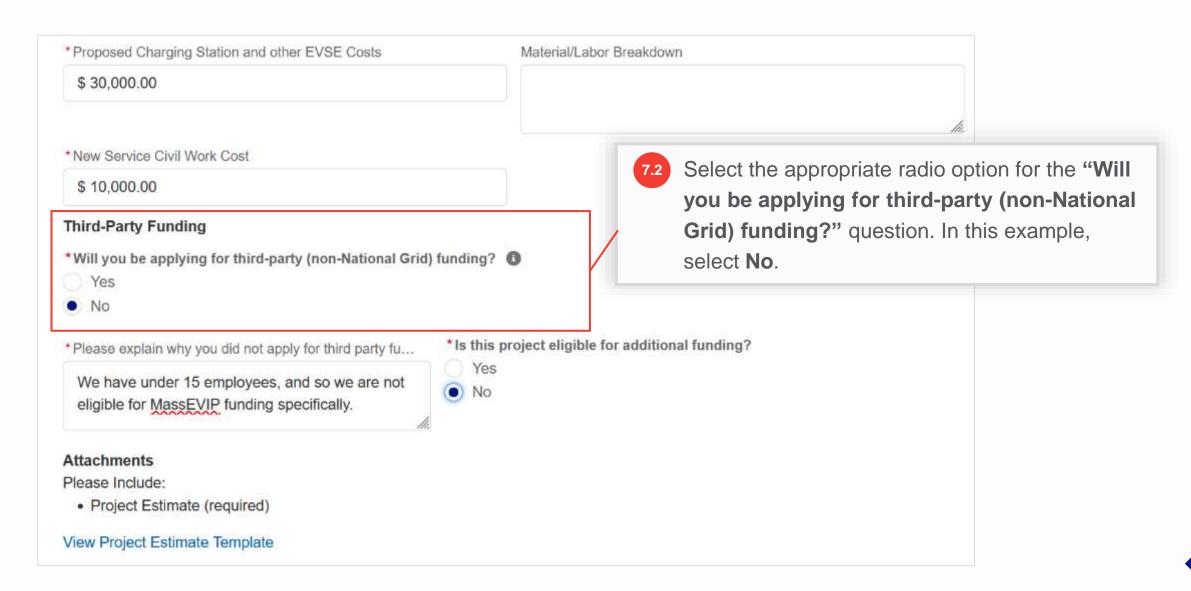
Once complete, they will need to Save the details.



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The third-party funding details will be saved and will appear as a collapsed tab showing the money bag icon, the funding source, and the amount. Users can click the tab to view the details. Users can also delete these details by clicking the icon.

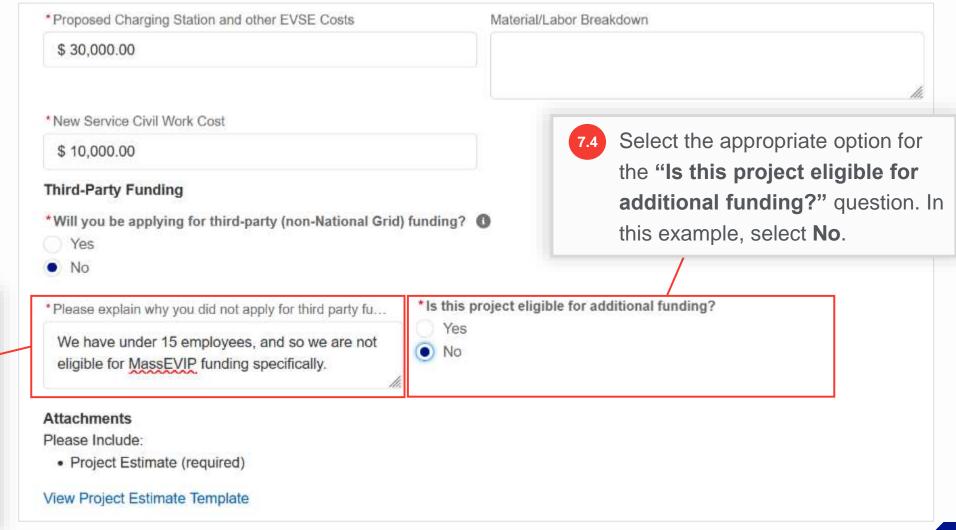




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Upon selecting No, a new field "Please explain why you did not apply for third party funding" and a new question, "Is this project eligible for additional funding?" will appear.

7.3 In the "Please explain why you did not apply for third party funding" field, add a reason for not applying for the third-party funding.



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Users also need to upload a Project
Estimate (and Third-party Funding
Approval Letter, if applicable). To
download the project estimate template,
users can click the View Project
Estimate Template link.

It is mandatory to attach the project estimate document to the application. If the user does not attach any documents before proceeding, they will receive an error message and the application will not move further.

Note that the maximum size per file is 10 MB. The supported files types are .docx, .pdf, .ppt, .pptx, .xls, .xlsx, .gif, .jpg, and .png.

#### **Attachments**

Please Include:

Project Estimate (required)

View Project Estimate Template

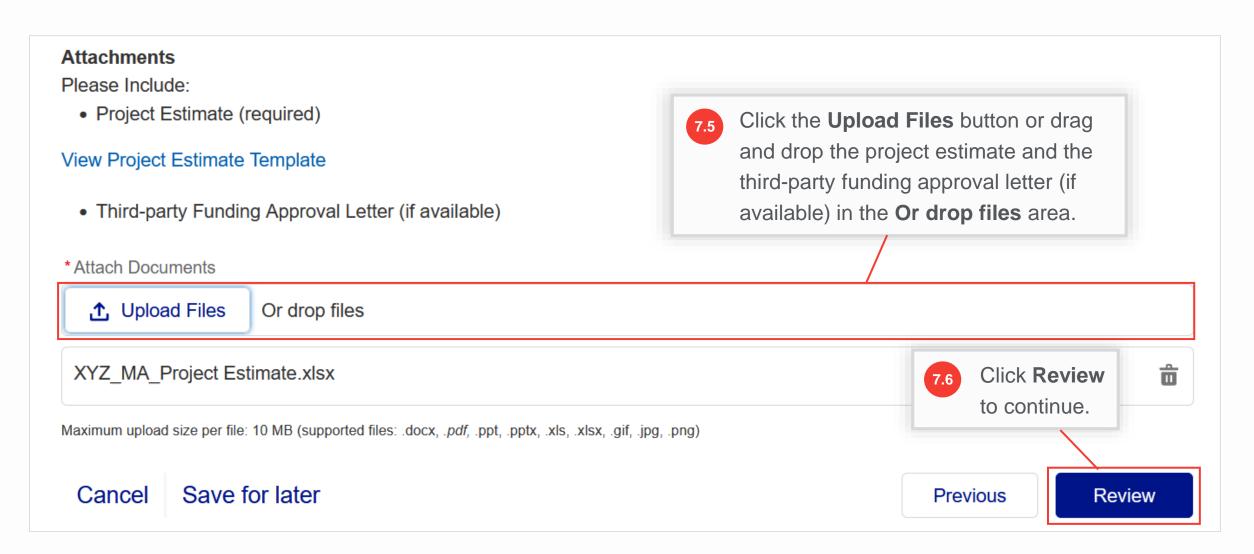
Third-party Funding Approval Letter (if available)

\* Attach Documents

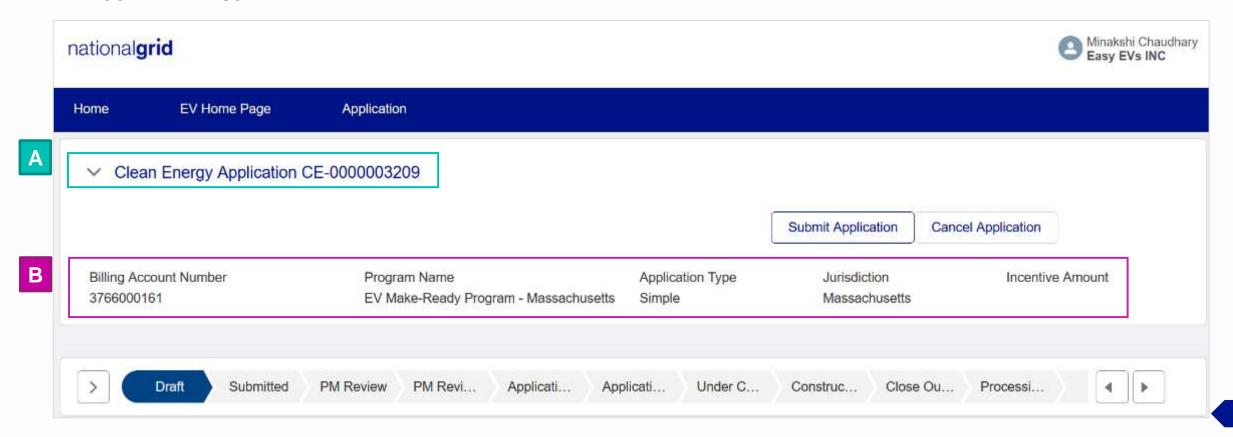
Or drop files

XYZ\_MA\_Project Estimate.xlsx

Maximum upload size per file: 10 MB (supported files: .docx, .pdf, .ppt, .pptx, .xls, .xlsx, .gif, .jpg, .png)

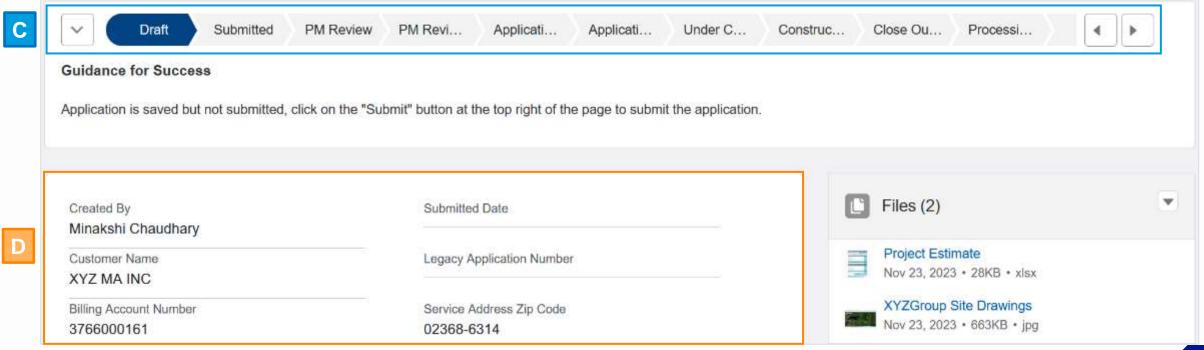


- A summary screen will appear with the completed application. Users can now review and confirm the details in each section. Note that a **Clean Energy Application** number is generated that will appear at the top-left part of the screen.
- Underneath, users can view their application highlights such as **Billing Account Number**, **Program Name**, **Application Type**, and **Jurisdiction**.





- Below the highlights, users will find a status path which indicates the progress of the application. At this stage, the application has a **Draft** status.
- The **Details** section below the status path will show the details including **Created By**, **Submitted Date** (currently empty as the application has not been submitted yet), **Customer Name**, **Legacy Application Number** (empty as it is a new application), **Billing Account Number**, and **Service Address Zip Code**.

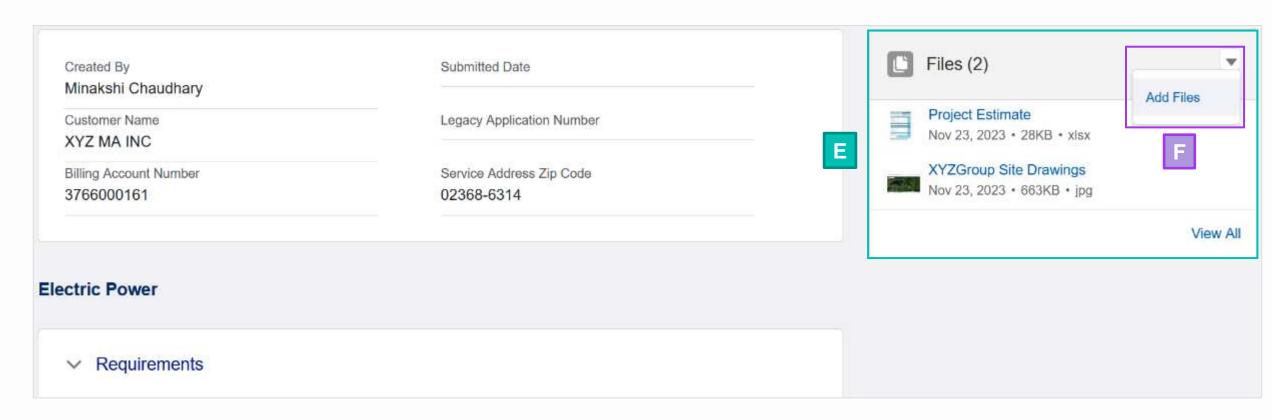


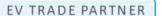


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- The **Files** section will display all files the user has attached to the application.
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If users want to attach additional files, they can click the drop-down arrow in the **Files** section and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

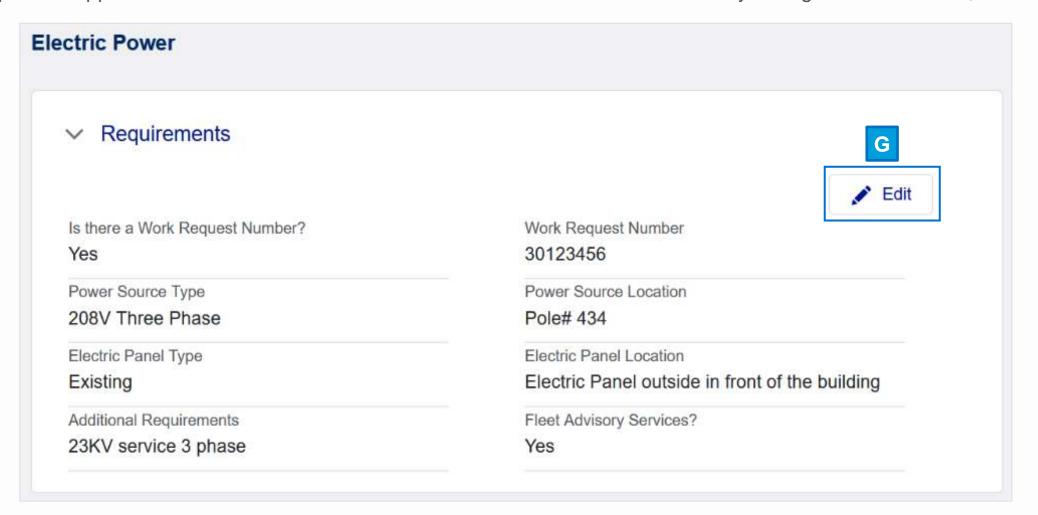


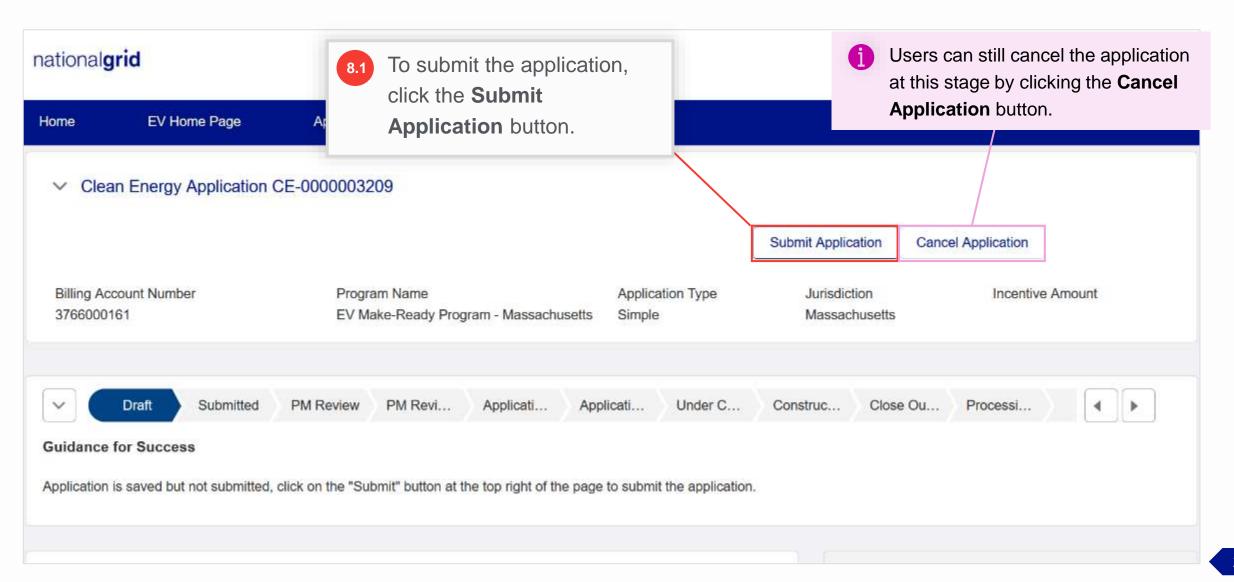


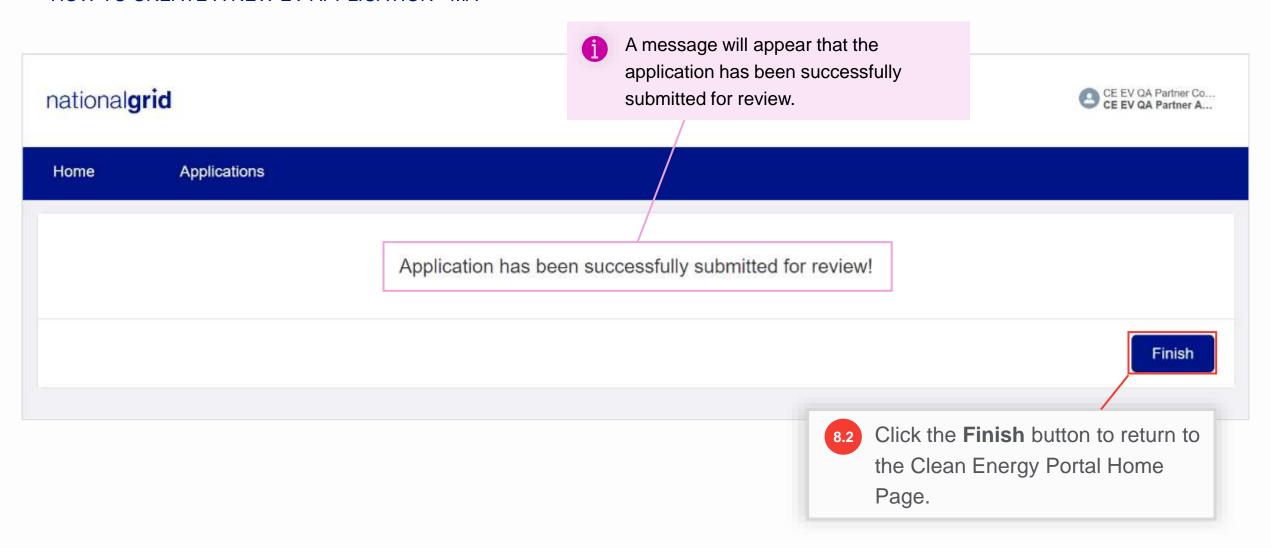
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Individual sections below the **Details** section will show all the fields with the information the user added during each step in the application. Users can click the **Edit** button in each section to make any changes to the section, if needed.







### **Clean Energy Portal Home Page**

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Users are taken back to the Clean Energy Portal homepage. They can view their application under the **In Progress** section in the **Application** tab.

Next, the application will be reviewed by the National Grid EV Analyst and Program Manager.

Home	EV Home Page	Application				
Q Search						
	Application Number	Legacy Application Number	Customer Name	Billing Account Number	City, State	Charger Type
✓ In Progress						
	CE-0000003209		XYZ MA INC	3766000161	RANDOLPH, MA	Level 2
	CE-0000003196		XYZ MA INC	3766000161	RANDOLPH, MA	DCFC
	CE-0000001380		MA Chargers	ABC Chargers MA	NANTUCKET, MA	Level 2
	CE-0000001359	EV-178271	XYZ MA INC	3766000161	RANDOLPH, MA	DCFC
	CE-0000001357	EV-179728	XYZ MA INC	3766000161	RANDOLPH, MA	Level 2