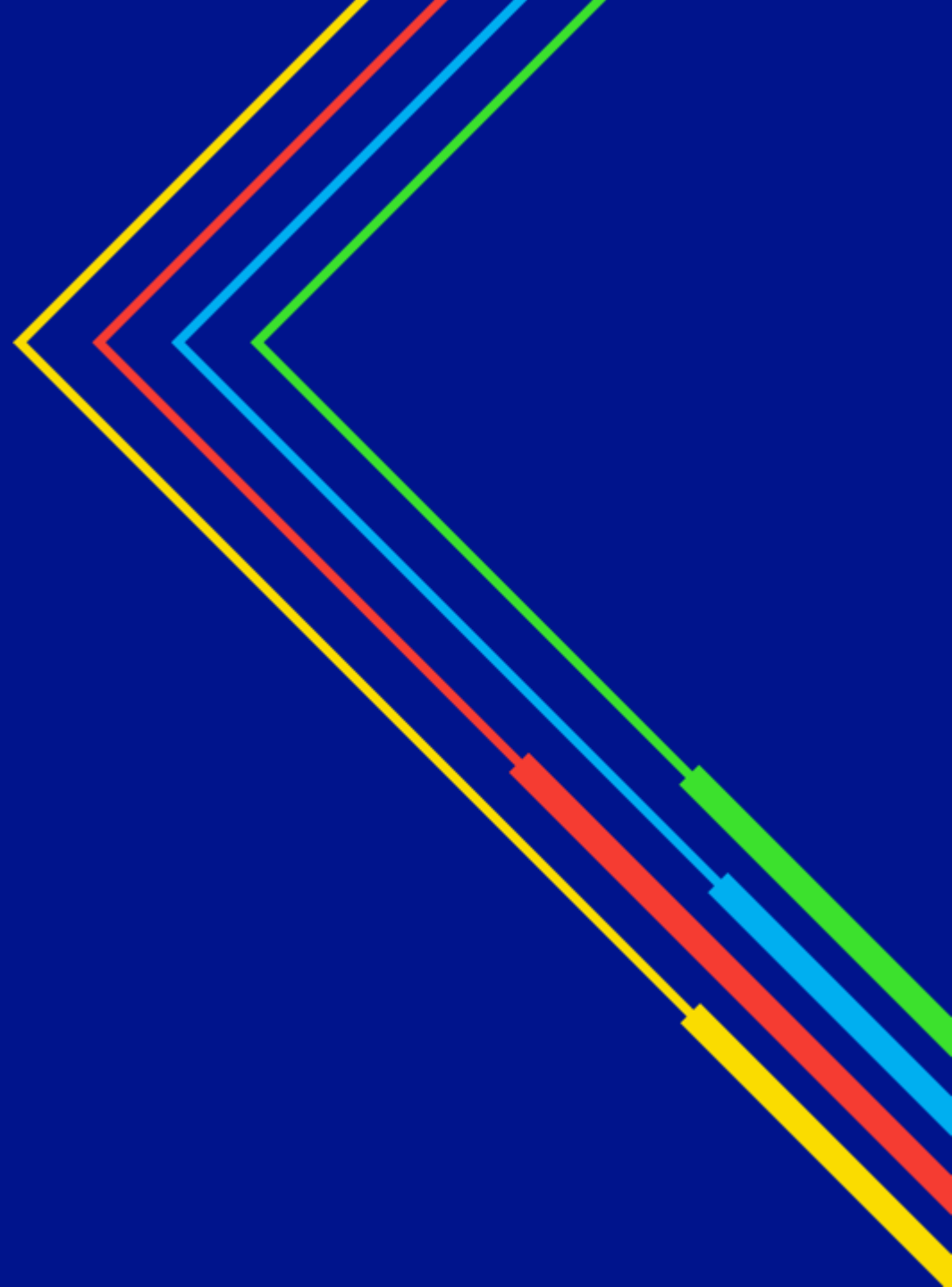


How to Sign Terms & Conditions and Determine Incentive Assignments

EV Make-Ready – Massachusetts

November 21, 2023



How to Sign Terms & Conditions and Determine Incentive Assignments



Learning Objectives

This module outlines the steps for signing Terms & Conditions and determining incentive assignments.

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

- FACILITY CONTACT

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

- Review and determine incentive assignments
- Sign Terms & Conditions

Approval Email

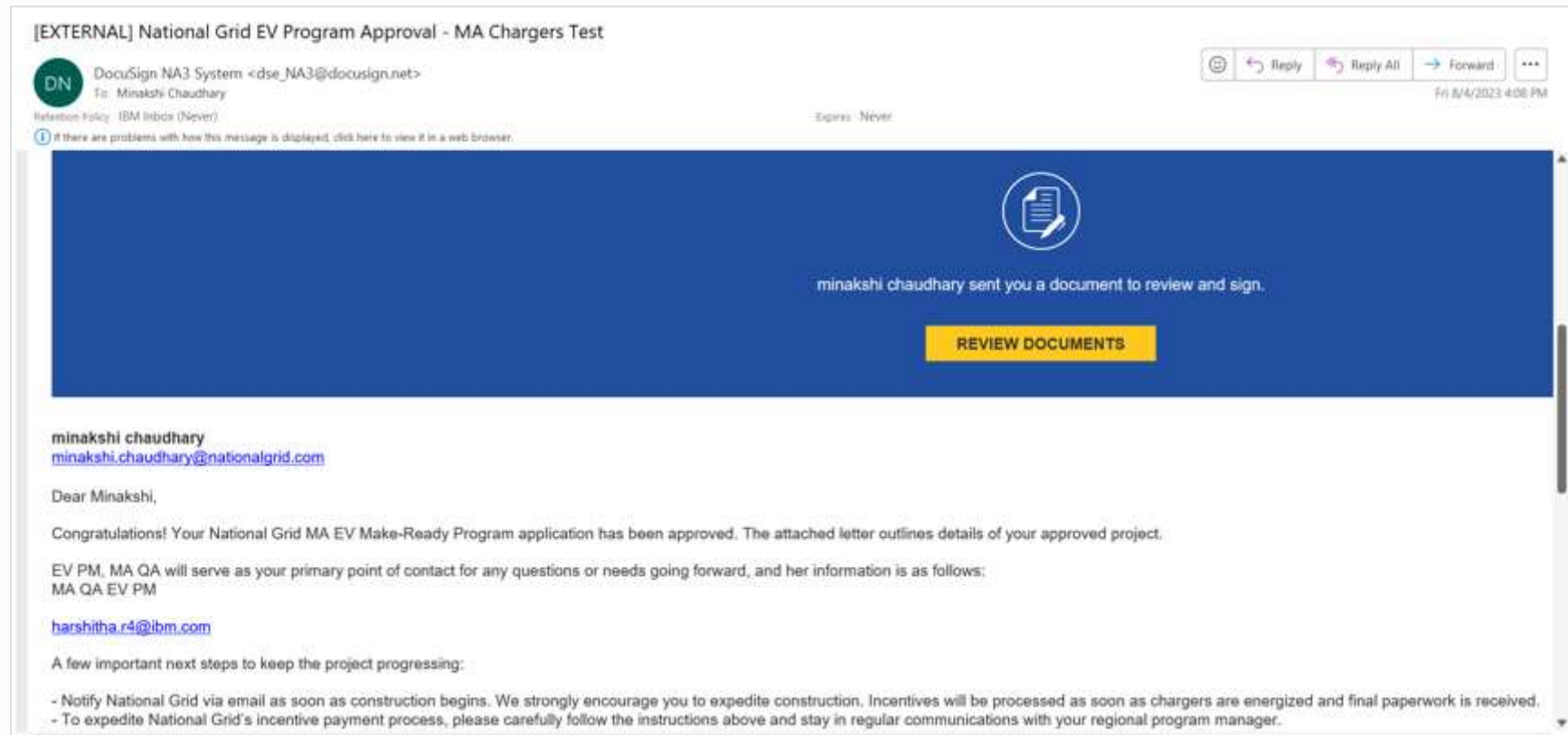
HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

When a new EV application is pre-approved, the Facility Contact will receive an email with the link to review and sign the documents in the approval package.

The documents include:

- Approval Letter
- Terms & Conditions
- Incentive Assignment Form
- Publicly Accessible and Fleet Environmental Justice Community Certification checklist

Here is a sample of an email that the Facility Contact will receive on pre-approval of the EV application.



Approval Email (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

[EXTERNAL] National Grid EV Program Approval - MA Chargers Test

DocuSign NA3 System <dse_NA3@docusign.net>
To: Minakshi Chaudhary

Retention Policy: IBM Inbox (Never) Expires: Never

Reply Reply All Forward

Fri 8/4/2023 4:08 PM

If there are problems with how this message is displayed, click here to view it in a web browser.

1 Click the **REVIEW DOCUMENTS** button to open and review the approval documents.

minakshi chaudhary sent you a document to review and sign.

REVIEW DOCUMENTS

minakshi chaudhary
minakshi.chaudhary@nationalgrid.com

Dear Minakshi,

Congratulations! Your National Grid MA EV Make-Ready Program application has been approved. The attached letter outlines details of your approved project.

EV PM, MA QA will serve as your primary point of contact for any questions or needs going forward, and her information is as follows:
MA QA EV PM
harshitha.r4@ibm.com

A few important next steps to keep the project progressing:


- Notify National Grid via email as soon as construction begins. We strongly encourage you to expedite construction. Incentives will be processed as soon as chargers are energized and final paperwork is received.
- To expedite National Grid's incentive payment process, please carefully follow the instructions above and stay in regular communications with your regional program manager.

Approval Documents

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA


The approval documents will open in a browser window for review.

Please Review & Act on These Documents DocuSign

 **minakshi chaudhary**
Clean Energy 2.0

Dear Minakshi,

[View More](#)

 Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

[CONTINUE](#) [OTHER ACTIONS](#) ▾

8/4/2023

2 Select the “I agree to use electronic records and signatures.” check box.

Funding Public and Workplace Program incentive which is contingent on the following organization: MA Chargers Test 9998887776

After a review of your Application and Site Plan, your project qualifies for a National Grid Incentive if installed as proposed. See details on page 2. This incentive is in the amount of: 40600.00

Please review the attached Terms and Condition and complete, sign, and return the following documents (also attached) to EVNationalGrid@nationalgrid.com at your earliest convenience to confirm acceptance of the terms and conditions and estimated incentives. National Grid's approval is contingent upon receipt of these documents within 10 business days and will not be in effect until then.


- **Funding Disclosure and Verification Form** (please fully complete all three sections)
- **Assignment of Rebates**

Approval Documents (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA


Completing Step 2 will activate the **CONTINUE** button.

Please Review & Act on These Documents DocuSign

 **minakshi chaudhary**
Clean Energy 2.0

Dear Minakshi,

[View More](#)

 Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

CONTINUE **OTHER ACTIONS** ▾

8/4/2023

Dear Minakshi

National Grid has approved your [National Grid EV Charging Public and Workplace Program](#) incentive by completing the tasks below. This incentive would be for the following organization: MA Chargers Test 9998887776

After a review of your Application and Site Plan, your project qualifies for a National Grid Incentive if installed as proposed. See details on page 2. This incentive is in the amount of: 40600.00

Please review the attached Terms and Condition and complete, sign, and return the following documents (also attached) to EVNationalGrid@nationalgrid.com at your earliest convenience to confirm acceptance of the terms and conditions and estimated incentives. National Grid's approval is contingent upon receipt of these documents within 10 business days and will not be in effect until then.

- Funding Disclosure and Verification Form (please fully complete all three sections)

View Approval Letter

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

The approval letter will be the first item in the package.

Please review the documents below. **FINISH** **OTHER ACTIONS** ▾

DocuSign Envelope ID: C3E05AA5-7330-4AD0-95D4-FEB82C2B6C8D

START

nationalgrid

MA Chargers Test
Minakshi Chaudhary
123 Chestnut Street
Boston, Massachusetts 02108

RE: National Grid EV Charging Public and Workplace Program Approval
BA Number: 9998887776
Project number CE-0000001130
Work Request number (if applicable):

8/4/2023

Dear Minakshi

National Grid has approved your **National Grid EV Charging Public and Workplace Program** incentive with the completion of the tasks below. This incentive would be for the following organization: MA Chargers Test 9998887776

After a review of your Application and Site Plan, your project qualifies for a National Grid Incentive if installed as per the details on page 2. This incentive is in the amount of **40600.00**

Please review the attached Terms and Condition and complete, sign, and return the following documents (also attached):
EVNationalGrid@nationalgrid.com at your earliest convenience to confirm acceptance of the terms and conditions and estimated

4 Scroll through the approval letter to review the details including the incentive amount.

7

View Approval Letter (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Enter text FINISH OTHER ACTIONS ▾

CM0271 (3/23) Par


START Commitment Letter.docx

DocuSign Envelope ID: C3E05AA5-7330-4AD0-95D4-FEB82C2B6C8D

nationalgi

Customer Acknowledgement and Acceptance of Terms

I certify that all statements made in this application are correct to the best of my knowledge and that I have read and agree to the terms and conditions included in this package.

Print Name:	Authorized Signature:	Date:	Expected Construction Date:	Expected Completion Date:
<input type="text" value="Minakshi Chaudhary"/>		08/04/2023	<input type="text" value="08/07/2023"/>	<input type="text" value="08/09/2023"/>

5 Enter your **Print Name, Expected Construction Date, and Expected Completion Date.**

View Approval Letter (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

The screenshot shows a DocuSign envelope interface. At the top, there is a blue header with 'Enter text' on the left, a 'FINISH' button, and 'OTHER ACTIONS' with a dropdown arrow. Below the header is a toolbar with icons for search, zoom, download, print, and help. The main content area shows the document title 'Commitment Letter.docx' and 'Page 2 of 1 of 2'. The document content includes the DocuSign Envelope ID: C3E05AA5-7330-4AD0-95D4-FEB82C2B6C8D, the National Grid logo, and the title 'Customer Acknowledgement and Acceptance of Terms'. A certification statement follows: 'I certify that all statements made in this application are correct to the best of my knowledge and that I have read and agree to the terms and conditions included in this package.' Below this is a table with five columns: Print Name, Authorized Signature, Date, Expected Construction Date, and Expected Completion Date. The 'Print Name' field contains 'Minakshi Chaudhary'. The 'Authorized Signature' field contains a yellow 'Sign' button with a downward arrow, which is highlighted with a red box and a red arrow pointing to a callout box. The 'Date' field contains '08/04/2023'. The 'Expected Construction Date' field contains '08/07/2023'. The 'Expected Completion Date' field contains '08/09/2023'. A yellow 'START' button is visible on the left side of the document preview.

Print Name:	Authorized Signature:	Date:	Expected Construction Date:	Expected Completion Date:
Minakshi Chaudhary	Sign ↓	08/04/2023	08/07/2023	08/09/2023

6

Click the **Sign** button to add the signature.

Sign Terms & Conditions (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

If you are signing a document via DocuSign for the first time, you will need to add your signature first.

Select the sign field to create and add your signature

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name*

Initials*

[SELECT STYLE](#) [DRAW](#) [UPLOAD](#)

PREVIEW

DocuSigned by:
Minakshi Chaudhary
F5D3A41EC0E1418...

DS
MC

[Change Style](#)

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature.

[ADOPT AND SIGN](#) [CANCEL](#)

7 Select **Change Style** to browse the available style options.

i You can either select a suggested style or draw / upload your signature. In this example, we've selected a style.

DocuSign | Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2023 DocuSign Inc. | VSR

Sign Terms & Conditions (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Select the sign field to create and add your signature

FINISH OTHER ACTIONS

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* Minakshi Chaudhary Initials* MC

[SELECT STYLE](#) DRAW UPLOAD

PREVIEW [Change Style](#)

DocuSigned by:
Minakshi Chaudhary
F5D3A41EC0E1418... DS
MC

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

DocuSign

Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2023 DocuSign Inc. | V28

9

Click **ADOPT AND SIGN** to continue with the selected style option.

Sign Terms & Conditions (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Enter date with format MM/DD/YYYY

FINISH **OTHER ACTIONS ▾**

Commitment Letter.docx 1 of 2

DocuSign Envelope ID: C3E05AA5-7330-4AD0-95D4-FEB82C2B6C8D

nationalgrid

Customer Acknowledgement and Acceptance of Terms

I certify that all statements made in this application are correct to the best of my knowledge and that I have read and agree to the terms and conditions included in this package.

Print Name:	Authorized Signature:	Date:	Expected Construction Date:	Expected Completion Date:
<input type="text" value="Minakshi Chaudhary"/>	<input type="text" value="DocuSigned by:
Minakshi Chaudhary
F5D3A41E-C0E1-441B"/>	<input type="text" value="08/04/2023"/>	<input type="text" value="08/07/2023"/>	<input type="text" value="08/09/2023"/>

FILL IN

i The signature will be added to the document.

Review Terms & Conditions

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Enter date with format MM/DD/YYYY

FINISH **OTHER ACTIONS ▾**

DocuSign Envelope ID: DC8B3E5F-E423-43F9-963D-F22467A548D4

nationalgrid

**ELECTRIC VEHICLE CHARGING STATION ELECTRICAL INFRASTRUCTURE PROGRAM
SITE HOST TERMS AND CONDITIONS**

The Site Host agrees to participate in the Electric Vehicle Charging Program offered by the Massachusetts Electric Company and Company d/b/a National Grid ("National Grid") pursuant to these terms and conditions ("Terms and Conditions"), set forth herein.

1. Definitions.

1.1 "Affiliate" means any Person controlling, controlled by, or under common control with, any other Person; "control" shall mean ownership, with right to vote, 50% or more of the outstanding voting securities, equity, membership interests, or equivalent interest in the Person.

1.2 "Agreement" means the Application, these Terms and Conditions and any exhibits and attachments which are incorporated into this Agreement.

1.3 "Application" means the Electric Vehicle (EV) Charging Station Electrical Infrastructure Application, including any attachments to the Application, and these Terms and Conditions.

1.4 "Commitment Letter" means the letter issued by National Grid stating National Grid's approval of the Customer's application, the amount of approved Rebate amounts, the number and types of stations being installed, the required completion date of EVSE installation, and any other requirements of National Grid related to the Rebate.

1.5 "Electric Distribution System Upgrades" means (i) National Grid Electric Distribution System Upgrades which includes, but is not limited to, transformer upgrade, service wire size increases; and (ii) Site Host's Electric Distribution System Upgrades which includes, but is not limited to, installation of wire and conduit from the Site Host's electrical panel to the EV charging station stub.

1.6 "Electric Distribution System Upgrade Financial Incentive" means National Grid's financial contributions toward the Site Host's Electric Distribution System Upgrades as defined above.

1.6 "EVSE" or "EV Charging Station" means the relevant Electric Vehicle Supply Equipment appearing on the eligible MA National Grid EVSE Qualified Equipment List.

1.7 "Equipment" means the EVSE and Site Host's Electric Distribution System Upgrades.

10 Scroll through the Terms & Conditions document and review the details.

NEXT

14

Sign Terms & Conditions (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Enter date with format MM/DD/YYYY

FINISH OTHER ACTIONS ▾

DocuSign Envelope ID: DC8B3E5F-E423-43F9-963D-F22467A548D4


nationalgrid

24. **Amendment.**
There shall be no amendment to this Agreement or any Program guidelines unless such is made by National Grid and mutually agreed upon by Site Host and National Grid.

25. **No Third Party Beneficiaries.**
This Agreement does not grant any rights to any third parties.

26. **Entire Agreement.**
This Agreement constitutes the entire agreement between National Grid and the Site Host with respect to the subject matter hereof, and any and all previous representations or agreements with respect to such subject matter, either oral or written, are hereby annulled and superseded. In the event of any conflict or inconsistency between the Agreement and any other Program Materials, the Agreement shall be controlling.

Site Host has read, understands and agrees to these Terms and Conditions

Site Host Initials: 

11 Click the **Sign** button to add your signature.

NEXT

15

Sign Terms & Conditions (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Enter date with format MM/DD/YYYY

FINISH OTHER ACTIONS ▾

DocuSign Envelope ID: DC8B3E5F-E423-43F9-963D-F22467A548D4

nationalgrid


NEXT

24. **Amendment.**
There shall be no amendment to this Agreement or any Program guidelines unless such is made by National Grid and mutually agreed upon by Site Host and National Grid.

25. **No Third Party Beneficiaries.**
This Agreement does not grant any rights to any third parties.

26. **Entire Agreement.**
This Agreement constitutes the entire agreement between National Grid and the Site Host with respect to the subject matter hereof, and any and all previous representations or agreements with respect to such subject matter, either oral or written, are hereby annulled and superseded. In the event of any conflict or inconsistency between the Agreement and any other Program Materials, the Agreement shall be controlling.

Site Host has read, understands and agrees to these Terms and Conditions

Site Host Initials 

i The signature will be added to the document.

Enter Incentive Assignment Details

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Enter text

FINISH OTHER ACTIONS ▾

Massachusetts EV Charging Station Program national

12 Scroll down to the Customer Assignment of Incentive Form section.

Customer Assignment of Incentive Form

This document certifies MA Chargers Test 's explicit authorization to pay
(Customer's Name)

the National Grid EV Charging Station Program rebate to
(Vendor)

EV Application # EV- CE-0000001130
(Application Number)

NEXT

Enter Incentive Assignment Details (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

The **Customer's Name**, **Program Incentive Amount**, and **Application Number** fields will be pre-filled.

The screenshot shows a web form titled "Massachusetts EV Charging Station Program" with the National Grid logo. The form is titled "Customer Assignment of Incentive Form" and contains the following pre-filled fields:

- This document certifies MA Chargers Test (Customer's Name)'s explicit authorization to pay
- the National Grid EV Charging Station Program rebate to XYZ Group MA (Vendor)
- EV Application # EV- CE-0000001130 (Application Number)

A red box highlights the "Vendor" field, which contains "XYZ Group MA". A callout box with the number 13 points to this field, containing the text: "In the **Vendor** field, enter the name of the vendor to which the incentive will be paid out. (This field is required)." The form also features a "NEXT" button on the left and "FINISH" and "OTHER ACTIONS" buttons at the top right.

13

In the **Vendor** field, enter the name of the vendor to which the incentive will be paid out. (This field is required).

Enter Incentive Assignment Details (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Enter text FINISH OTHER ACTIONS ▾

EV Application # EV- CE-0000001130
(Application Number)

Entity to Receive Incentive Payment (Payee must submit a W-9 form)

Company Name:

Individual Name:

Company Address:

14 Scroll down to the **Entity to Receive Incentive Payment** section, and enter the:

- **Company Name** (*the vendor who will receive the incentive payment*)
- **Individual Name**
- **Company Address**

NEXT

hereby assign any right, title or interest that I may have in the incentive payment to the Entity list

Customer Name: MA Chargers Test

Customer Signature:
11202AM1100E1418L

Date:

15 Insert your **Signature**.

i The **Date** field will be pre-filled.

Review the Project Closeout Checklist

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Enter text FINISH OTHER ACTIONS ▾

Publicly Accessible and Fleet Environmental Justice Community Certification

Name of Applicant:

Project Number: EV-

Disclosure Form

Please review the following sections and complete each section applicable to the project for which submitted an application in the EV portal. Once complete please sign and date at the bottom of the form.

SECTION A: To be completed for any projects identified as publicly accessible in the application
(check yes or no as applicable and complete questions)

Does your project meet the following criteria?

- Does the parking area provide the general public practical access to, and use of, the parking area and the EV charging station(s) for 24 hours per day, 7 days per week, at the location identified in the application? yes no
- If no due to access restrictions is there access at least 12 hours per day, 7 days per week? yes no

Does the applicant agree to operate the parking area in the manner described above for the term of the EV Program? yes no

16 Scroll down to the **Publicly Accessible and Fleet Environmental Justice Community Certification** checklist and enter the **Name of the Applicant**.

17 Select appropriate responses for the checklist questions.

NEXT

Review the Project Cost Estimate

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Done! Select Finish to send the completed document. **FINISH** OTHER ACTIONS ▾

If no due to access restrictions is there access at least 12 hours per day, 7 days per week? yes no
 Does the applicant agree to operate the parking area in the manner described above for the term of the EV Program? yes no

SECTION B: To be completed for any projects identified as fleets in the application

If you operate a fleet, please answer the following (locations within the Massachusetts defined EJC map is available [here](#)):

registered in census block groups that meet the Commonwealth of Massachusetts' EJC-Income criteria? yes no
 registered in census block groups that meet the Commonwealth of Massachusetts' EJC criteria? yes no
 operating more than 50 percent of the time within census block groups that meet the Commonwealth of Massachusetts' EJC-Income criteria? yes no
 D. Is your fleet operating more than 50 percent of the time within census block groups that meet the Commonwealth of Massachusetts' EJC criteria? yes no

I certify that the above information is accurate.

Print Name Signature Date

18

Select the "I certify that the above information is accurate." check box.

19

Input your **Print Name** and **Signature**.

Finish Document Signing

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

Done! Select Finish to send the completed document.

FINISH OTHER ACTIONS ▾

🔍 🔍 ⬇️ 🖨️ ?

C. Is your fleet operating more than 50 percent of the time within census block groups that meet the Commonwealth of Massachusetts' EJC-Income criteria? yes no

D. Is your fleet operating more than 50 percent of the time within census block groups that meet the Commonwealth of Massachusetts' EJC criteria? yes no

I certify that the above information is accurate.

Print Name Minakshi Chaudhary Signature *Minakshi Chaudhary* Date 08/04/2023

Publicly Accessible and Fleet Environmental Justice Community Certification

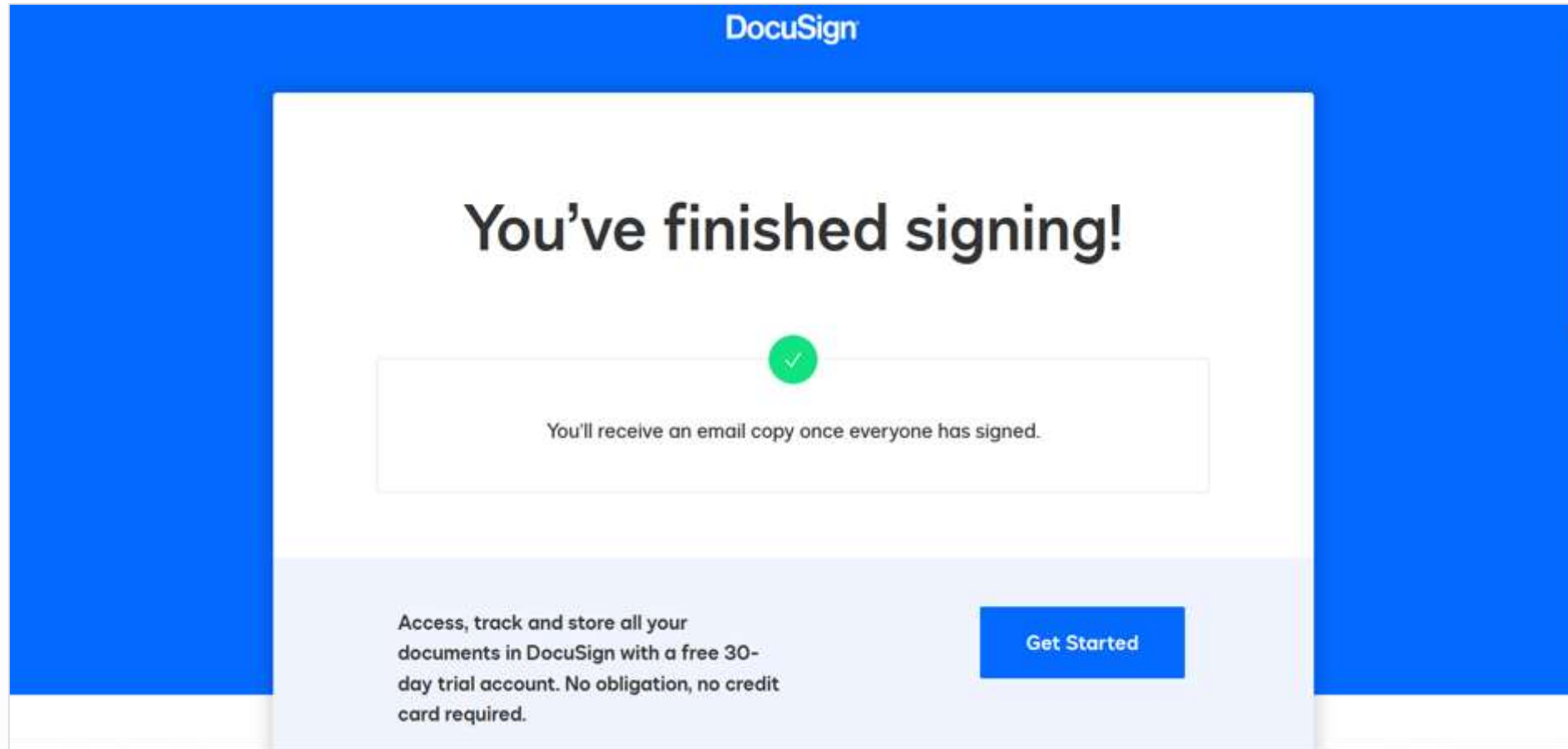
FINISH

20 Finally, select either of the **FINISH** buttons to officially sign the documents.

Finish Document Signing (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

A message will appear indicating that you have finished signing. You can now close the browser window to exit.



Finish Document Signing (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS - MA

You will receive an email with a copy of all signed documents, stating that the approval is complete. You can either download each attached document separately, or select the **VIEW COMPLETED DOCUMENTS** button to navigate to DocuSign and view / download the entire set of documents from there as combined or separate PDFs.

[EXTERNAL] Completed: National Grid EV Program Approval - MA Chargers Test

DocuSign NA3 System <dse_NA3@docusign.net>
To: Minakshi Chaudhary

Retention Policy: IBM Inbox (Never) Expires: Never

If there are problems with how this message is displayed, click here to view it in a web browser.

Commitment Letter.docx.pdf 296 KB Terms and Conditions.pdf 230 KB
Incentive Assignment.pdf 181 KB Publicly Accessible and Fleet Environmental Justice Community Certification.pdf 188 KB

Your document has been completed

[VIEW COMPLETED DOCUMENTS](#)

minakshi chaudhary
minakshi.chaudhary@nationalgrid.com

All parties have completed National Grid EV Program Approval - MA Chargers Test.

Dear Minakshi,

End of Procedure