

How to Upload Missing Documents in an EV Application

EV Make-Ready – Massachusetts

November 28, 2023



How to Upload Missing Documents in an EV Application - MA



Learning Objectives

This module outlines the steps for uploading missing documents in an EV application.

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

- EV TRADE PARTNER

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

- Locate the notification and EV Application for which missing documents need to be uploaded
- Identify and upload the missing documents

Required Documents Notification

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

At times, additional documents (such as Paid Invoice, Project Photos, W9, Work Permit, and so on) may be required for closeout of an EV application. In such cases, Program Managers may identify the required documents and send a notification to the EV Trade Partner to upload the documents on the Portal.

i The notification will provide the details of the application as well as a link to the Portal.

Sandbox: Documents Required for EV Application CE-0000001130 for XYZ Group MA

AU noreply@salesforce.com on behalf of Admin User <jayashys@in.ibm.com>
To: Chaudhary, Minakshi

Hello!

In order to move forward with project closeout, we require certain documents to be provided by you.

Please login to the portal and look for the application marked "Documents Needed," and click on "Review" to upload the required document/s.

Details
Application #: CE-0000001130
Account: XYZ Group MA
Site Address: 123 Chestnut Street, Boston, MA, 02108

[Link to Portal](#)

Best Regards

1 To start uploading missing documents, click **Link to Portal**.

View Missing Documents Checklist

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

The Portal will open with a list of all recent applications.

The screenshot shows a web portal with a dark blue header containing navigation links: Home, EV Home Page, and Application. Below the header is a large banner with the text "Welcome MA EV!" and "Take advantage of programs and incentives to help support".

Below the banner is a table of applications. The table has three rows, each with an application ID, name, status, and a "Review" button. The status for all three applications is "Documents Needed".

Application ID	Application Name	Status	Action
CE-0000001129	XYZ Group MA	Documents Needed	Review
CE-0000001130	XYZ Group MA	Documents Needed	Review
CE-0000001061	ABC Chargers MA	Documents Needed	Review

Callout 1 (Information icon): The EV applications that require the user to upload missing documents will be marked as "Documents Needed".

Callout 2 (Number 2 icon): Click the **Review** button for the application to display the missing documents checklist. In this example, we've selected the **Review** button for the application **CE-0000001130**.

Other elements visible in the screenshot include a "View All" link, a "Start Application" button for the "EV Charging Station Make-Ready Program", and a "Resources" section with links to "Massachusetts EV Charging Program" and "New York EV Charging Program".

View Missing Documents Checklist (cont.)

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

The **Missing Documents Checklist** will open and display all documents that the user needs to upload for the closeout of the application. The user can see:

A The EV application details at the top

B The missing document names and the corresponding **Upload Files** buttons below the application details

nationalgrid

MA QA Trade Partner.
MA QA EV Partner A.

Home EV Home Page Application

Missing Documents Checklist

Application Details

Application Number: CE-0000001130
Account Name: XYZ Group MA
Site Address: 123 Chestnut Street, Boston, Massachusetts, 02108
Jurisdiction: Boston, Massachusetts
Charger Type: Level 2
Status: Construction Complete

*Work Permit ⓘ

Upload Files Or drop files

*Project Closeout Certification ⓘ

Upload Files Or drop files

Cancel Next

Document Guidance

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

Missing Documents Checklist

Application Details

Application Number: CE-0000001130

Account Name: XYZ Group MA


Site Address: 123 Chestnut Street, Boston, Massachusetts, 02108

Jurisdiction: Boston, Massachusetts


Charger Type: Level 2


Status: Construction Complete

*Work Permit 

 Upload Files Or drop files

*Project Closeout Certification 

 Upload Files Or drop files

3 Hover the mouse pointer over the  (info) icon to learn more about a document.

Customer Certification of satisfactory installation

Cancel

Next

Document Guidance (cont.)

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

The table below provides guidance on various documents required for closeout.

Document	Description
Paid Invoice	<ul style="list-style-type: none">Final contractor invoice(s) to customer indicating the project's as-built costs, customer balance, and payment received. Values must match the Signed Customer ContractTemplate provided on NG website
Project Photos	<ul style="list-style-type: none">Photos of the completed project including stations (individual and grouping), new equipment, and exterior and interior work completedNetwork IDS/ Serial numbers, if easily accessible
Proof of Active and Operating Station(s)	<ul style="list-style-type: none">Examples include:<ul style="list-style-type: none">Export from network showing charging sessions occurring at each stationActivation on PlugShare or another station-finding app <p>Note that it is important to show that each port has had usage, has been plugged into, and is working.</p>
W9	<ul style="list-style-type: none">A copy of the W9 for the entity receiving the incentive payment (customer or payee or both if payee is receiving incentive)
Assignment of Incentive Form	<ul style="list-style-type: none">If applicable and if changed from initial submittal, the Assignment of Incentive Form must be signed by the customer

Document Guidance (cont.)

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

Document	Description
As Built Drawings	<ul style="list-style-type: none">Both drawings must be provided in PDF format
Invoice	<ul style="list-style-type: none">The invoice should contain, at minimum the following:<ul style="list-style-type: none">FROM: The entity receiving the incentive paymentTO: National GridAmount: The approved EV MRP Incentive AmountThe EV number (EV-00000)Template provided on the NG website
Work Permit	<ul style="list-style-type: none">Copy of the City / Town work permit
Project Closeout Certification	<ul style="list-style-type: none">Customer Certification of satisfactory installation

Upload Missing Documents

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

Missing Documents Checklist

Application Details

Application Number: CE-0000001130

Account Name: XYZ Group MA

Site Address: 123 Chestnut Street, Boston, Massachusetts, 02108

Jurisdiction: Boston, Massachusetts

Charger Type: Level 2

Status: Construction Complete

* Work Permit 

 Upload Files Or drop files

* Project Closeout Certification 

 Upload Files Or drop files

Cancel

4

Click **Upload Files** and select the file to upload or drag and drop the file in the corresponding field to upload it.

Next

Upload Missing Documents (cont.)

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

Missing Documents Checklist

Application Details

Application Number: CE-0000001130

Account Name: XYZ Group MA


Site Address: 123 Chestnut Street, Boston, Massachusetts, 02108

Jurisdiction: Boston, Massachusetts

Charger Type: Level 2


Status: Construction Complete

* Work Permit 

 Upload Files

Or drop files

* Project Closeout Certification 

 Upload Files

Or drop files

Work Permit_XYZ Group MA.pdf



Project Closeout Certification_XYZ Group MA.pdf



Cancel

5

When all documents are uploaded, click **Next** to continue.

Next

Files Received Message

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

A message will appear that the files have been received. The “**Documents Needed**” message for the application will disappear from the Portal.

The screenshot shows the National Grid portal interface. At the top left is the 'nationalgrid' logo. At the top right, there is a user profile icon and the text 'MA QA Trade Partner...' and 'MA QA EV Partner A...'. Below the logo is a dark blue navigation bar with the links 'Home', 'EV Home Page', and 'Application'. The main content area is white and contains a message box titled 'Files Received' with a blue underline. The message text reads: 'Thank you for submitting! The documents will be reviewed and you will be notified shortly if any additional information is needed.' Below the message box, there are three buttons: 'Cancel' on the left, 'Previous' in the center, and 'Next' on the right. The 'Next' button is highlighted with a red border. A red callout box with the number '6' in a red circle points to the 'Next' button with the text 'Click **Next** to continue.'

nationalgrid

MA QA Trade Partner...
MA QA EV Partner A...

Home EV Home Page Application

Files Received

Thank you for submitting! The documents will be reviewed and you will be notified shortly if any additional information is needed.

Cancel Previous **Next**

6 Click **Next** to continue.

View Application Details

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

Users can view the uploaded files in the application record as well.

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-0000003196		XYZ MA INC	3766000161	RANDOLPH, MA	Level 2		Submitted
CE-0000001381		MA Chargers	ABC Chargers MA	Boston, MA	DCFC		Documentation Received
CE-0000001380		MA Chargers	ABC Chargers MA	Boston, MA	Level 2		Documentation Received
CE-0000001359		MA Chargers	ABC Chargers MA	Boston, MA	DCFC		Documentation Received
CE-0000001357		MA Chargers	ABC Chargers MA	Boston, MA	DCFC		Application Approved
CE-0000001356		MA Chargers	ABC Chargers MA	Boston, MA	DCFC		PM Review Completed
CE-0000001355		MA Chargers	ABC Chargers MA	Boston, MA	Level 2		Application Approved
CE-0000001229		MA Chargers	ABC Chargers MA	Boston, MA	DCFC		PM Review Completed
CE-0000001130		XYZ MA INC	XYZ Group MA	Boston, MA	Level 2	\$40,600.00	Construction Complete
CE-0000001027		MA Chargers	EV chargers MA	Boston, MA	DCFC		Submitted
CE-0000000965		MA Chargers	Harshitha MA	Boston, MA		\$789,000.00	Application Approved

7 Click the application row in the **Applications** tab to view the application details.

View Application Details (cont.)

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - MA

The uploaded files will be visible in the application record.

Clean Energy Application CE-0000001130

Billing Account Number	Program Name	Application Type	Jurisdiction	Incentive Amount
XYZ Group MA	EV Make-Ready Program - Massachusetts	Simple	Massachusetts	40600

Progress: [Application] [Submitted] [Approved] [Construction] [Close Out] [Processing] [Paid] [Failed] [Rejected] [Cancelled]

Guidance for Success

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

Created By	Submitted Date
MA EV QA REG	07/24/2023
Customer Name	Legacy Application Number
XYZ MA INC	
Billing Account Number	Service Address Zip Code
9998887776	02108

Files (3+)

- Project Closeout Certification_XYZ Group MA
Aug 10, 2023 • 25KB • pdf
- Work Permit_XYZ Group MA
Aug 10, 2023 • 25KB • pdf

End of Procedure