IT and Digital

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

EV Make-Ready – New York

February 8, 2024

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

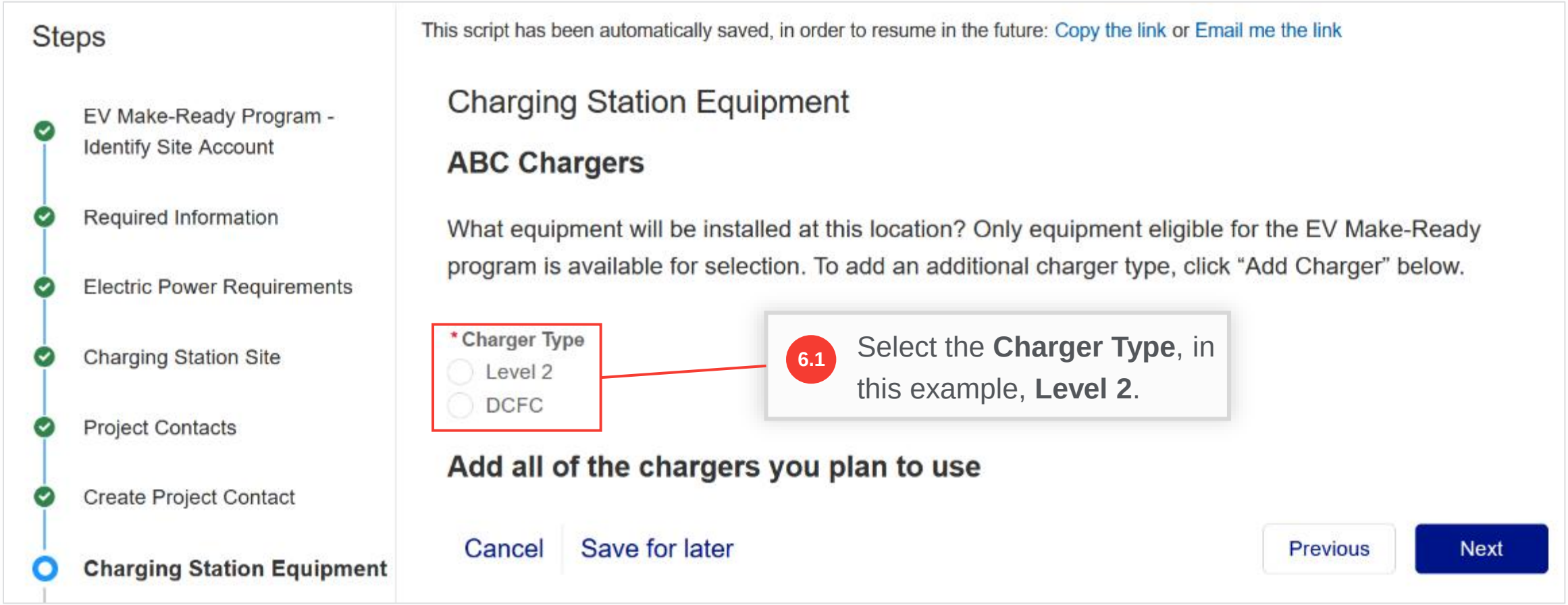
By the end of this module, users will be able to:

- 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:
  - Charging station equipment information
  - Third-party funding (if applicable)
  - Cost and payment information
- Attach supporting documents to the application

Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

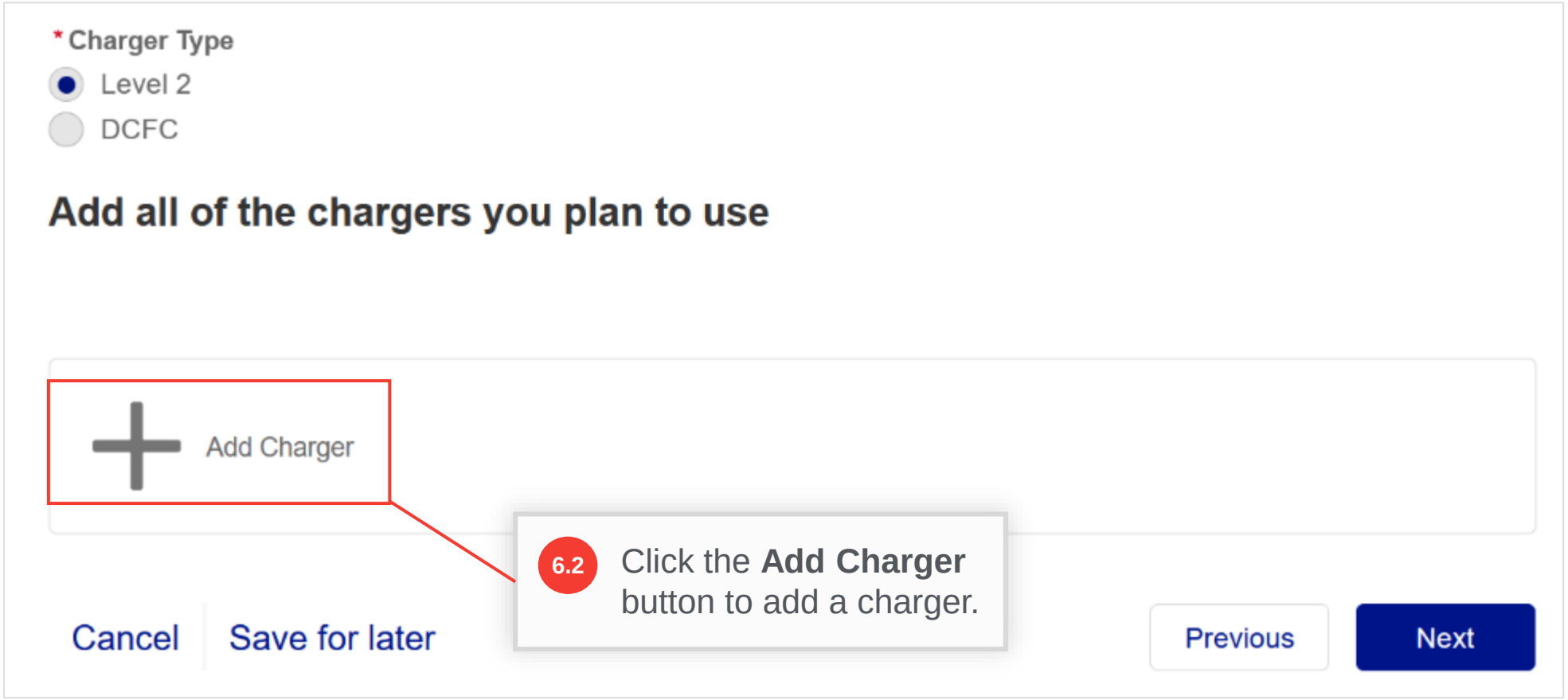
The **Charging Station Equipment** screen will appear. This screen allows users to enter the details of the equipment that will be installed at this location.



Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

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



Step 6: Charging Station Equipment

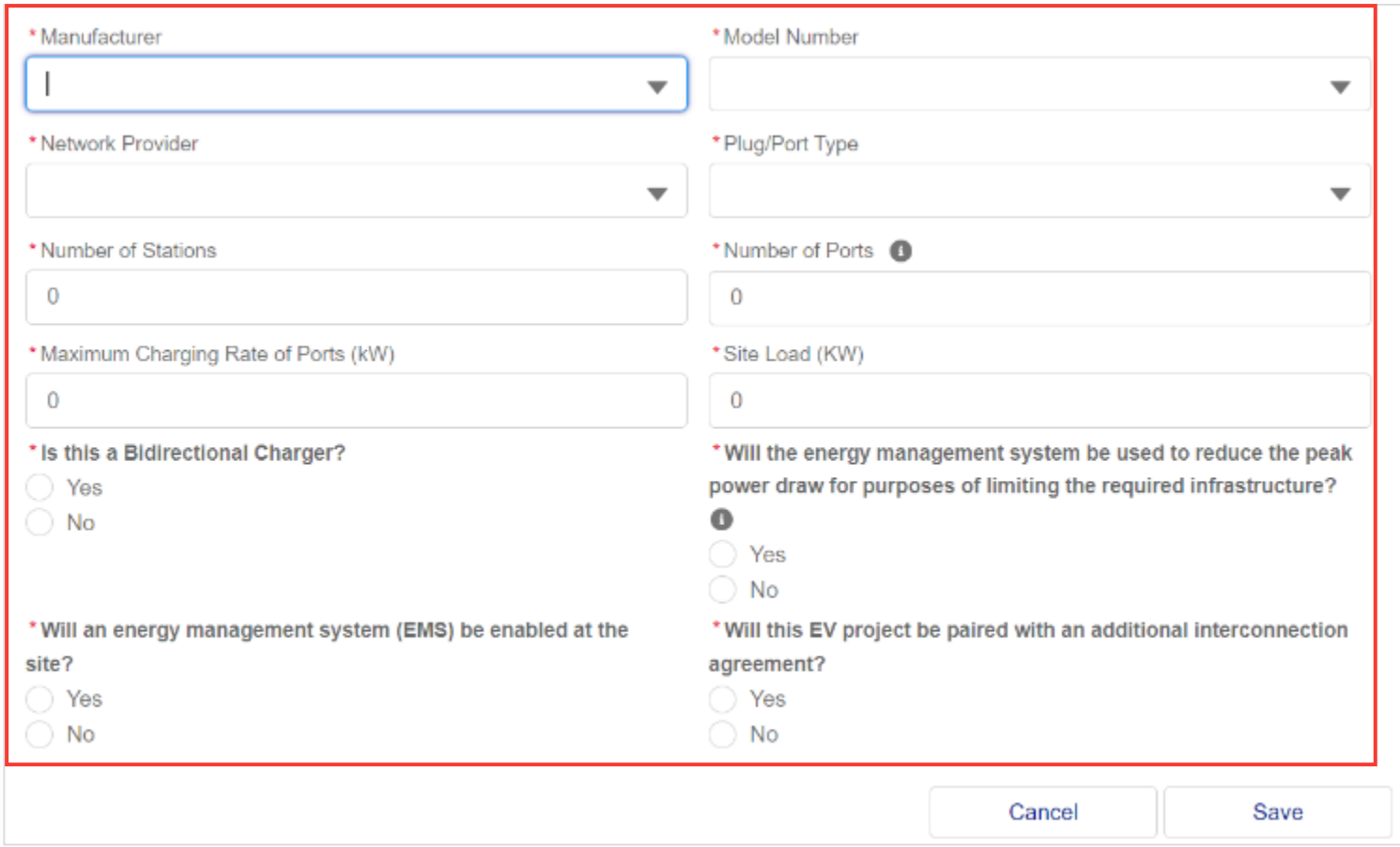
HOW TO CREATE A NEW EV APPLICATION - NY

After selecting **Add Charger** in Step 6.2, additional fields will appear for the users 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 needs to enter any other charger (Manufacturer / Model Number, etc.), it will need approval from the Program Manager. The approval process is explained in slides 16-20.

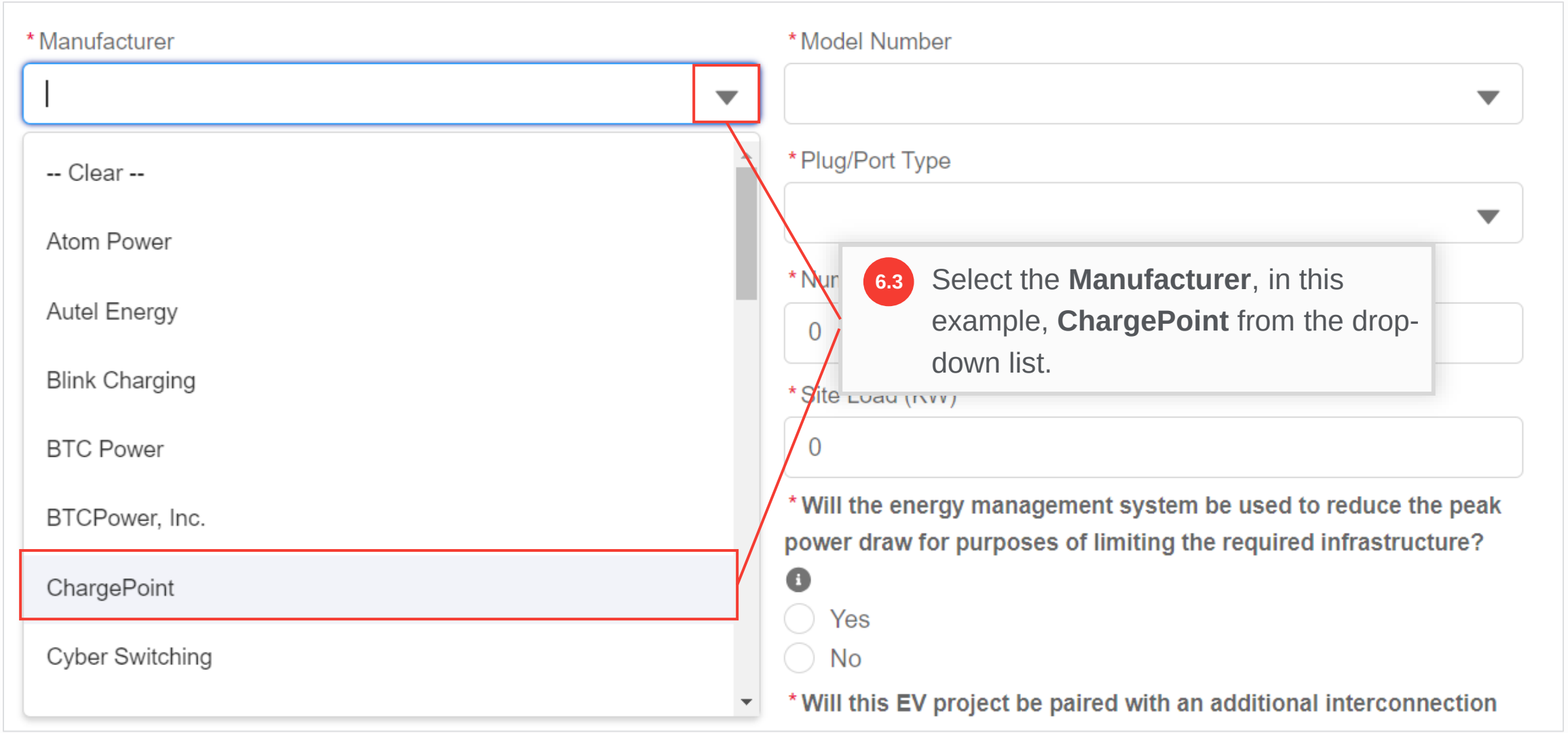
Users can add as many different chargers or models as they plan on installing.

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.



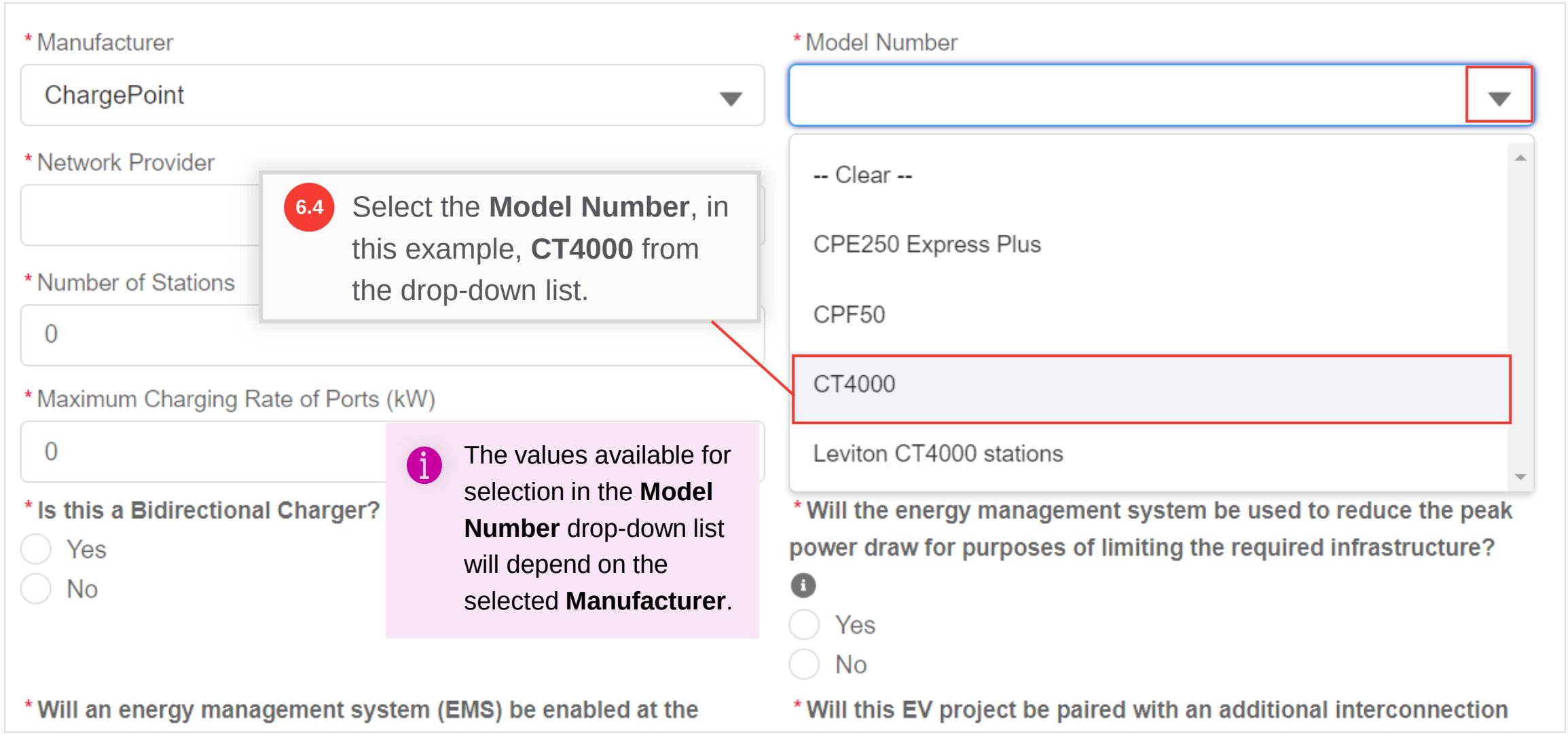
Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY



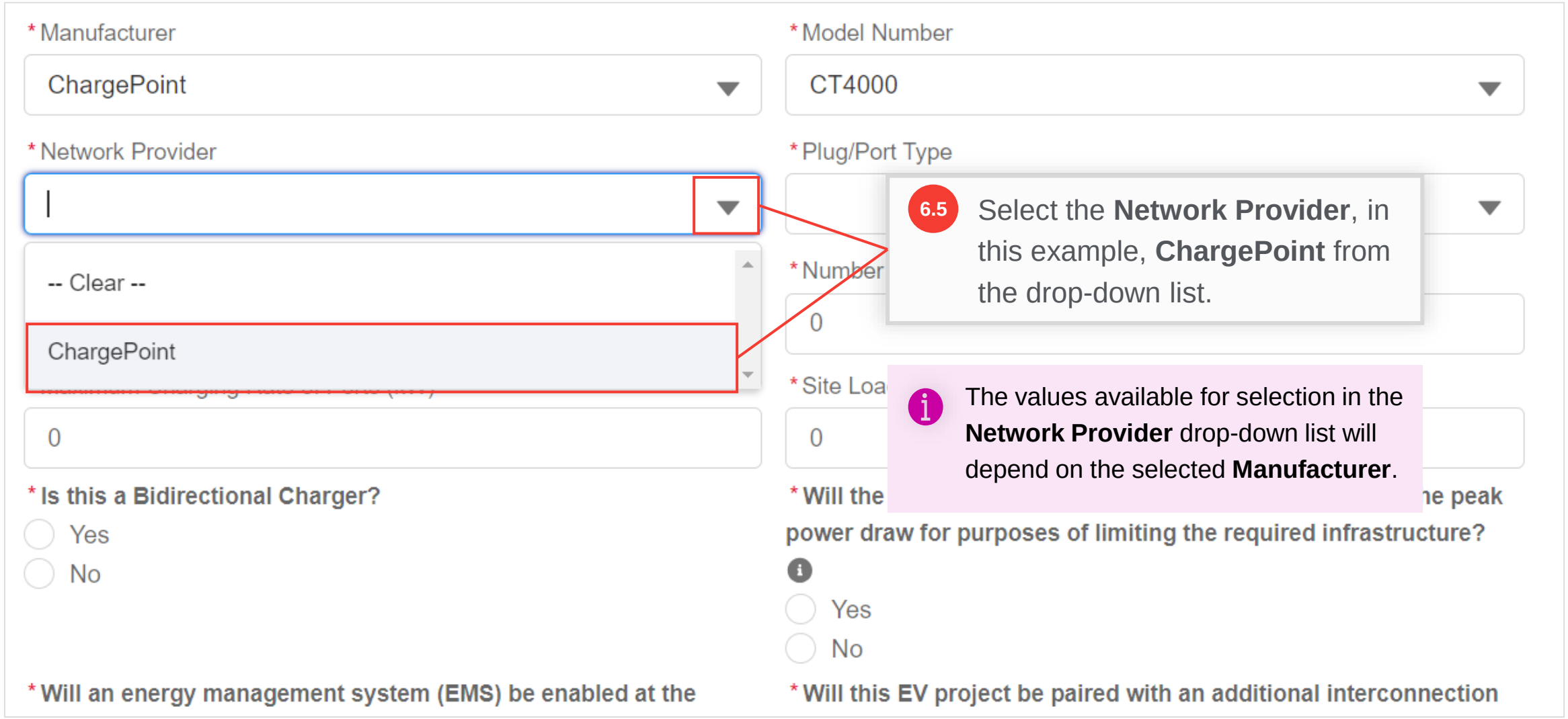
Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY



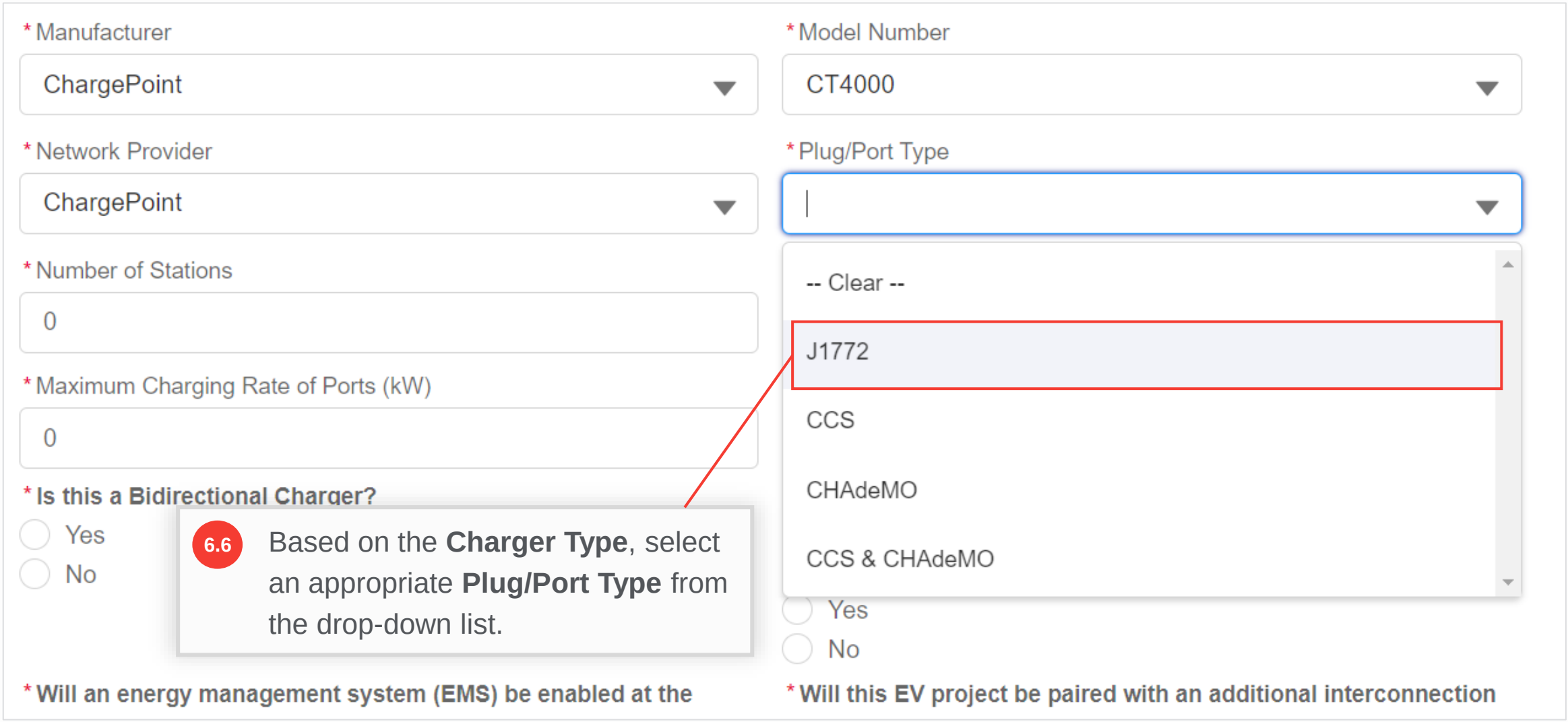
Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY



Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

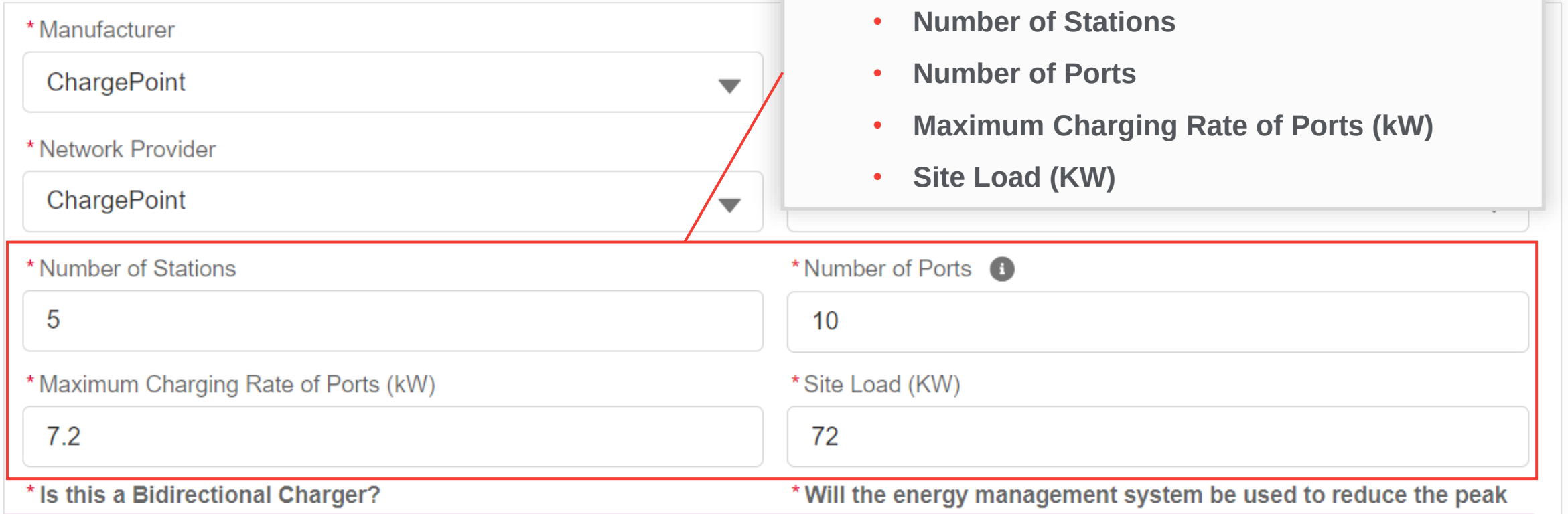


Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

6.7 Enter the following details:

- **Number of Stations**
- **Number of Ports**
- **Maximum Charging Rate of Ports (kW)**
- **Site Load (KW)**



The **Number of Ports** field refers to the total number of ports for the specified number of stations. In this example, there are 5 dual port stations. Therefore, the **Number of Ports** will be **5 x 2 = 10**.

The value of the **Site Load (KW)** field should be calculated as: **Number of Ports [10] x Maximum Charging Rate of Ports (kW) [7.2] = 72**.

Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

* Maximum Charging Rate of Ports (kW)

7.2

* Site Load (KW)

72

* **Is this a Bidirectional Charger?**

- ○ Yes
- ● No

* **Will the energy management system be used to reduce the peak power draw for purposes of limiting the required infrastructure?**

- ● Yes
- ○ No

* **Will an energy management system (EMS) be enabled at the site?**

- ● Yes
- ○ No

* What is the modified site load?

70

* **Will this EV project be agreement?**

- ○ Yes
- ● No

6.8 Select answers for the following questions:

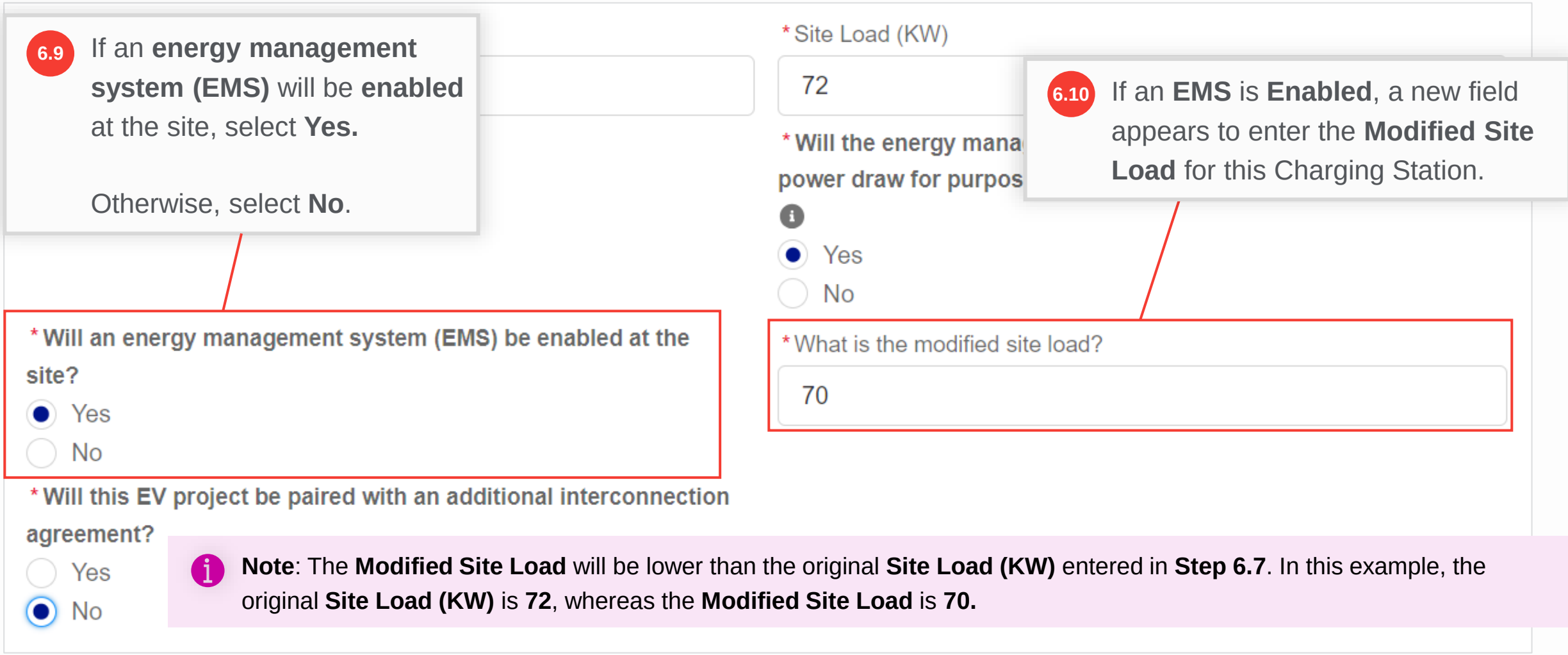
- **Is this a Bidirectional Charger?**
- **Will the energy management system be used to reduce the peak power draw for purposes of limiting the required infrastructure?**

Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

6.9 If an **energy management system (EMS)** will be **enabled** at the site, select **Yes.**

Otherwise, select **No**.



6.10 If an **EMS** is **Enabled**, a new field appears to enter the **Modified Site Load** for this Charging Station.

Note: The **Modified Site Load** will be lower than the original **Site Load (KW)** entered in **Step 6.7**. In this example, the original **Site Load (KW)** is **72**, whereas the **Modified Site Load** is **70.**

Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

* Maximum Charging Rate of Ports (kW)

7.2

* Site Load (KW)

72

* **Is this a Bidirectional Charger?**

- ○ Yes
- ● No

* **Will the energy management system be used to reduce the peak power draw for purposes of limiting the required infrastructure?**

- ● Yes
- ○ No

* **Will an energy management system (EMS) be enabled at the site?**

- ● Yes
- ○ No

* What is the modified site load?

70

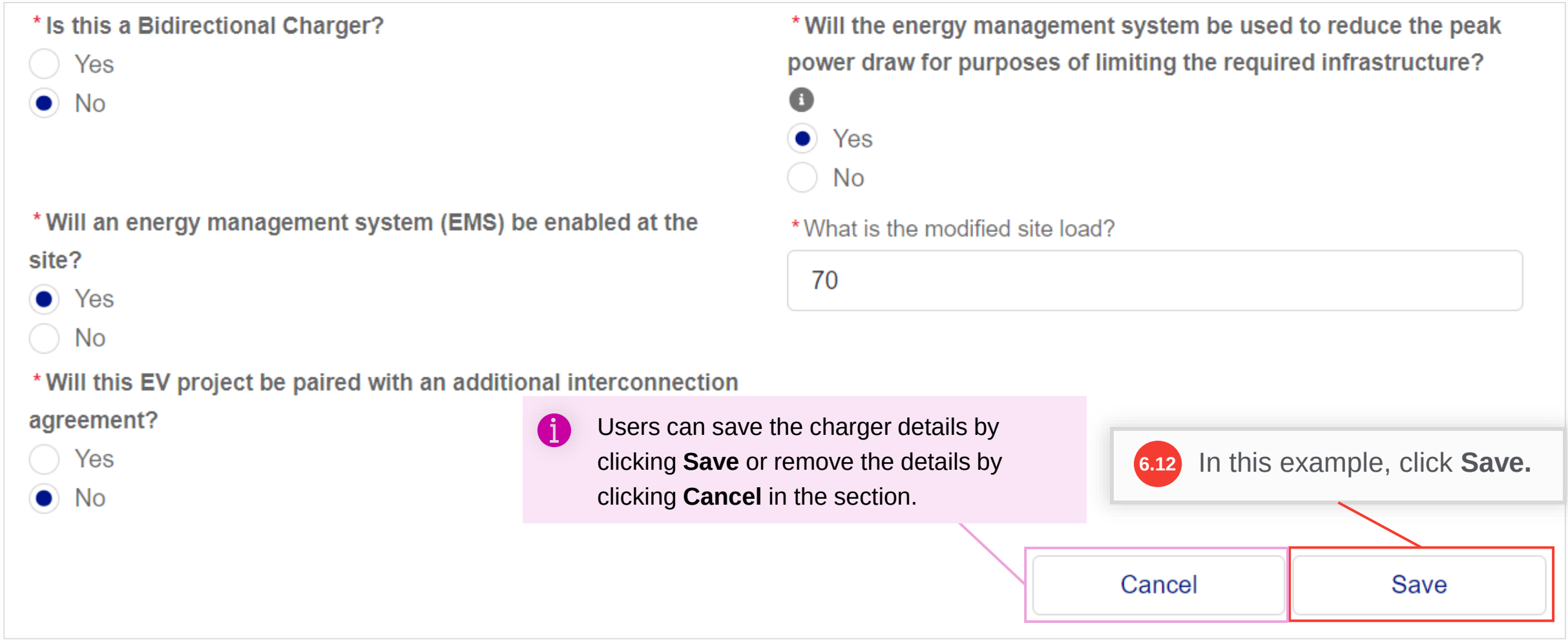
* **Will this EV project be paired with an additional interconnection agreement?**

- ○ Yes
- ● No

6.11 Select an appropriate answer for the question, "**Will this EV project be paired with an additional interconnection agreement?**".

Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

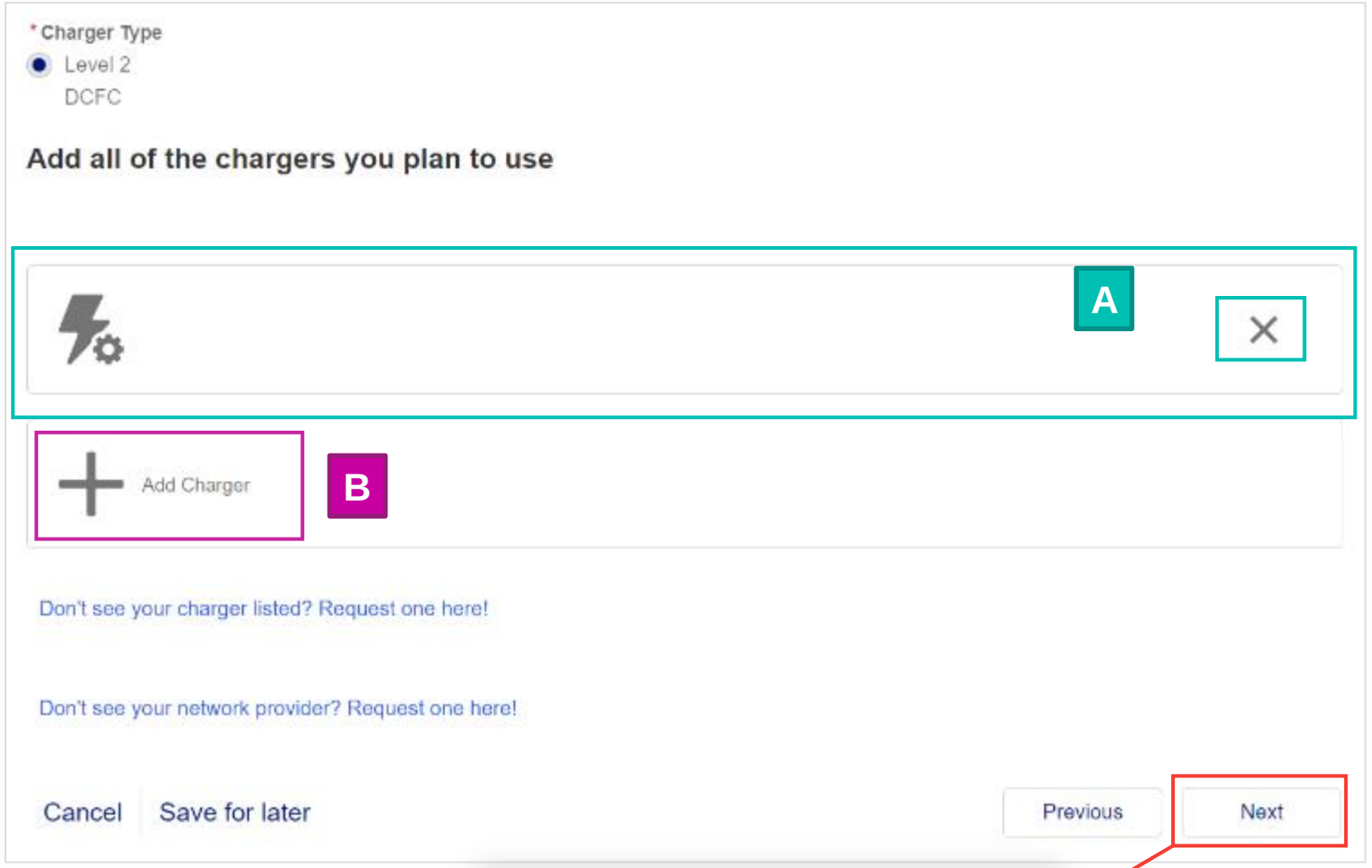


Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

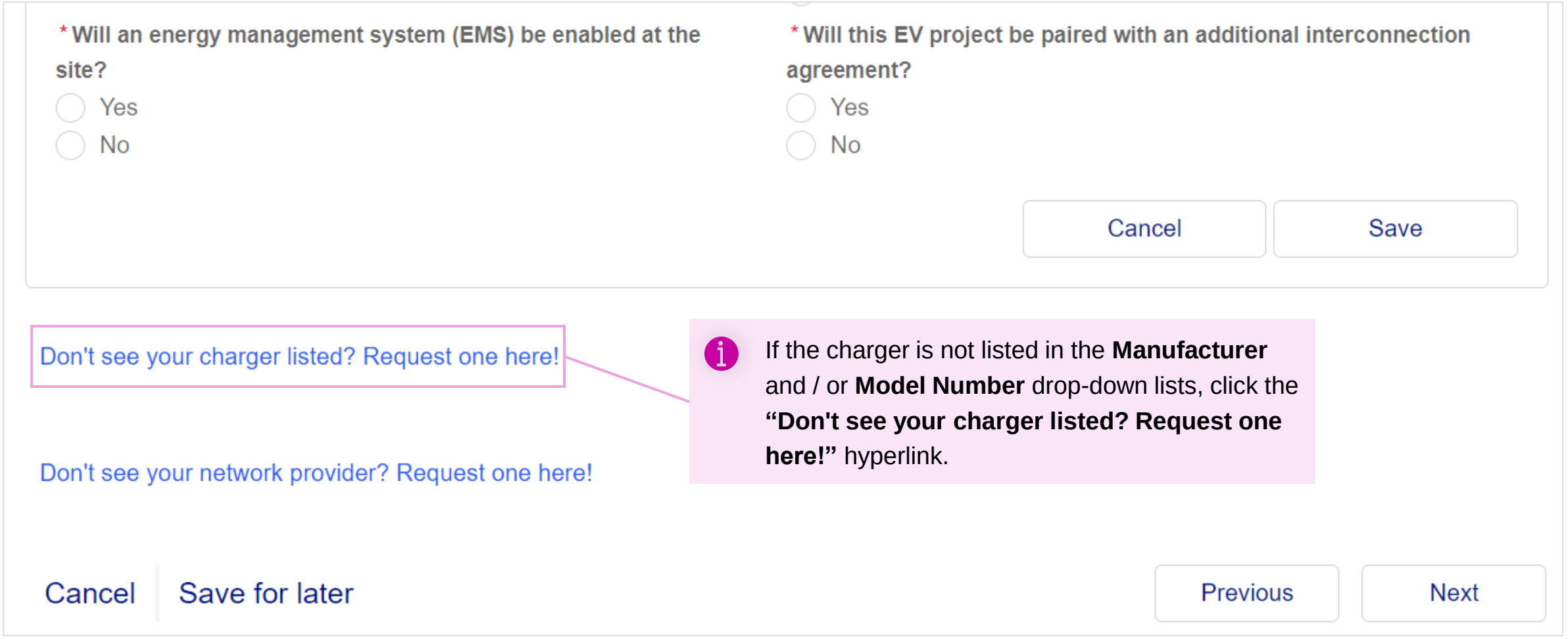
A The charger details will be saved and will appear as a collapsed tab showing the lightning and gear icon. Users can click the tab to view the details. Users can also delete these details by clicking the **X** icon.

B Users can add as many chargers from different manufacturers or models as they plan on installing by clicking the **Add Charger** button again. However, the **Charger Type** must remain the same as the first charger.
For example, in this application, now only **Level 2 Charger Type** can be added. For adding a **DCFC Charger Type**, users will need to create a separate EV application.



Step 6: Charging Station Equipment

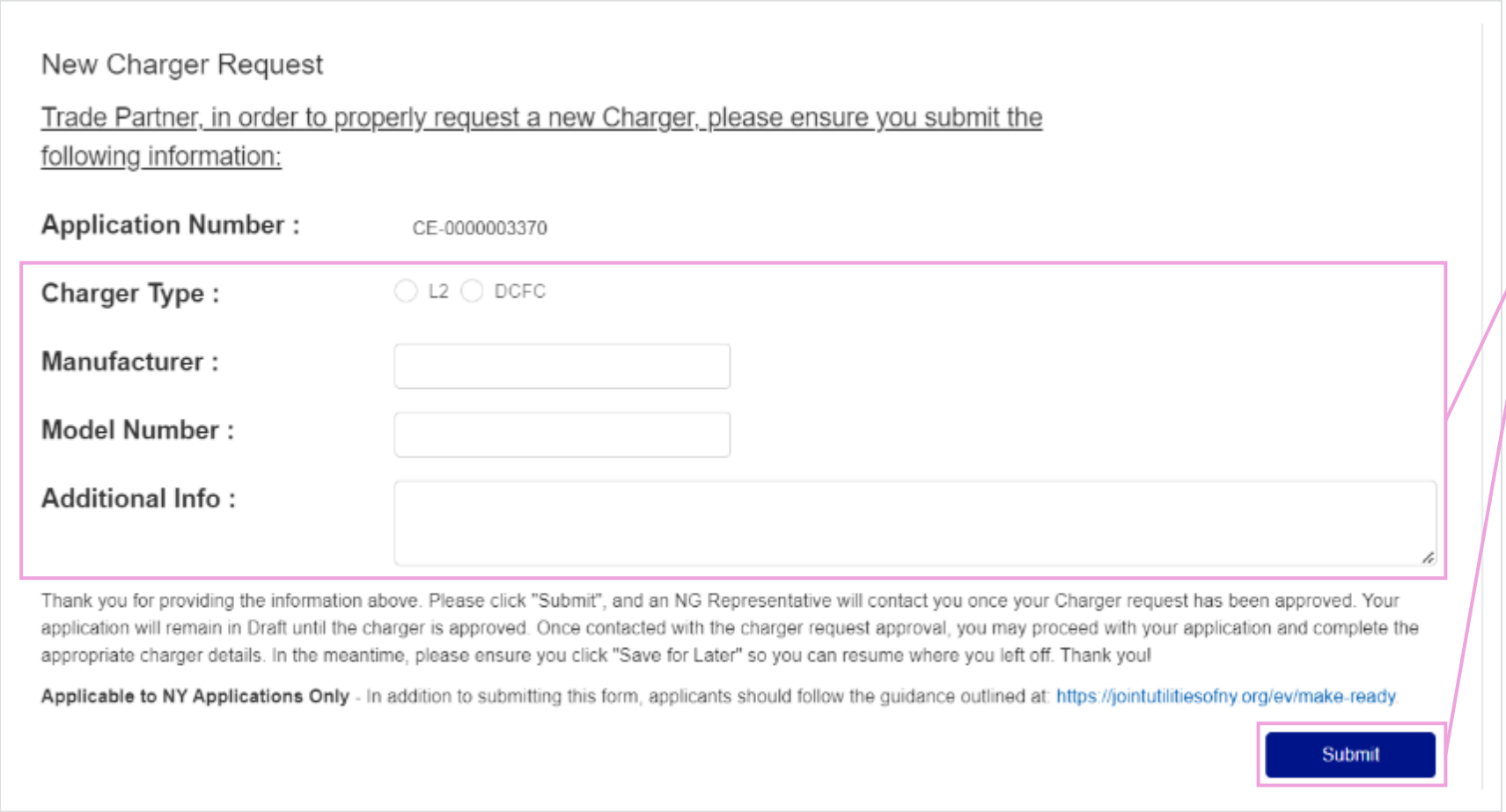
HOW TO CREATE A NEW EV APPLICATION - NY



If the charger is not listed in the **Manufacturer** and / or **Model Number** drop-down lists, click the **"Don't see your charger listed? Request one here!"** hyperlink.

Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

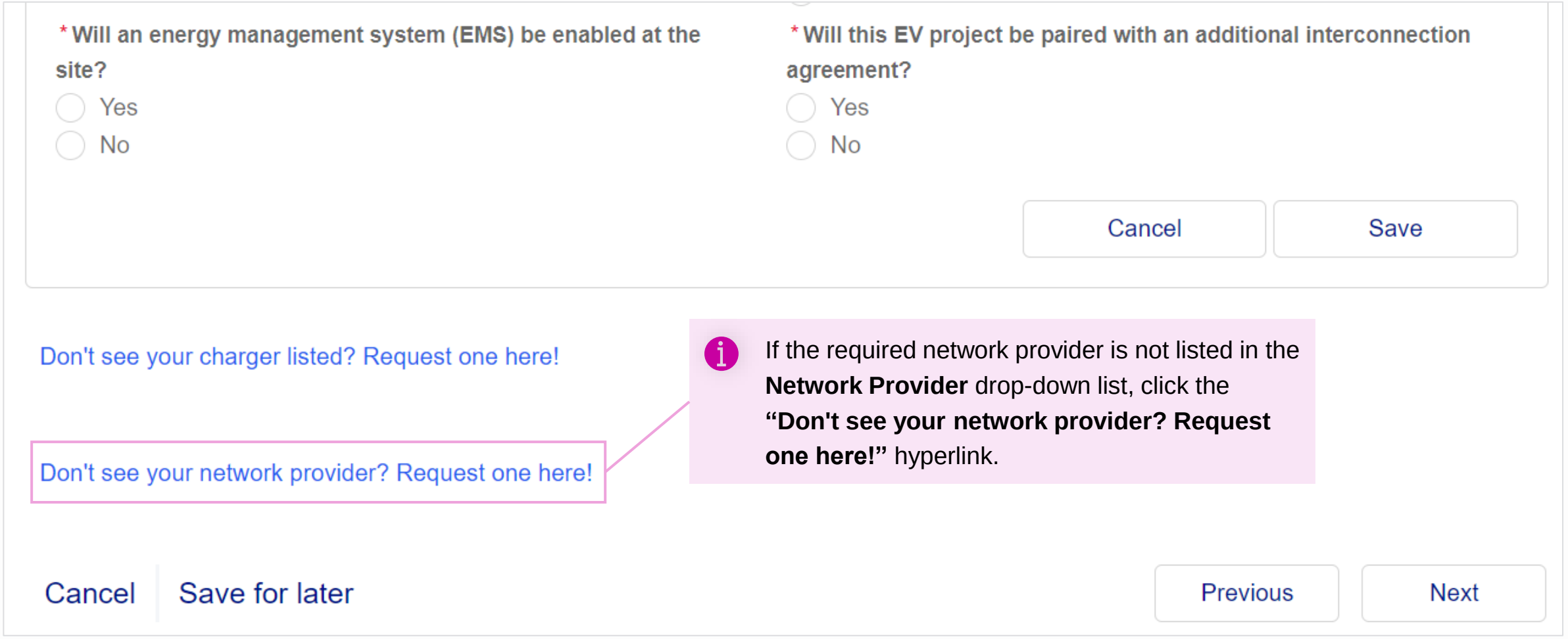


The **New Charger Request** form will appear in a pop-up window. Enter the charger details including **Charger Type**, **Manufacturer**, **Model Number**, and any **Additional Info**, and then click **Submit**.

Users can also send the new charger approval request to the National Grid Program Manager or EV Analyst via email.

Step 6: Charging Station Equipment

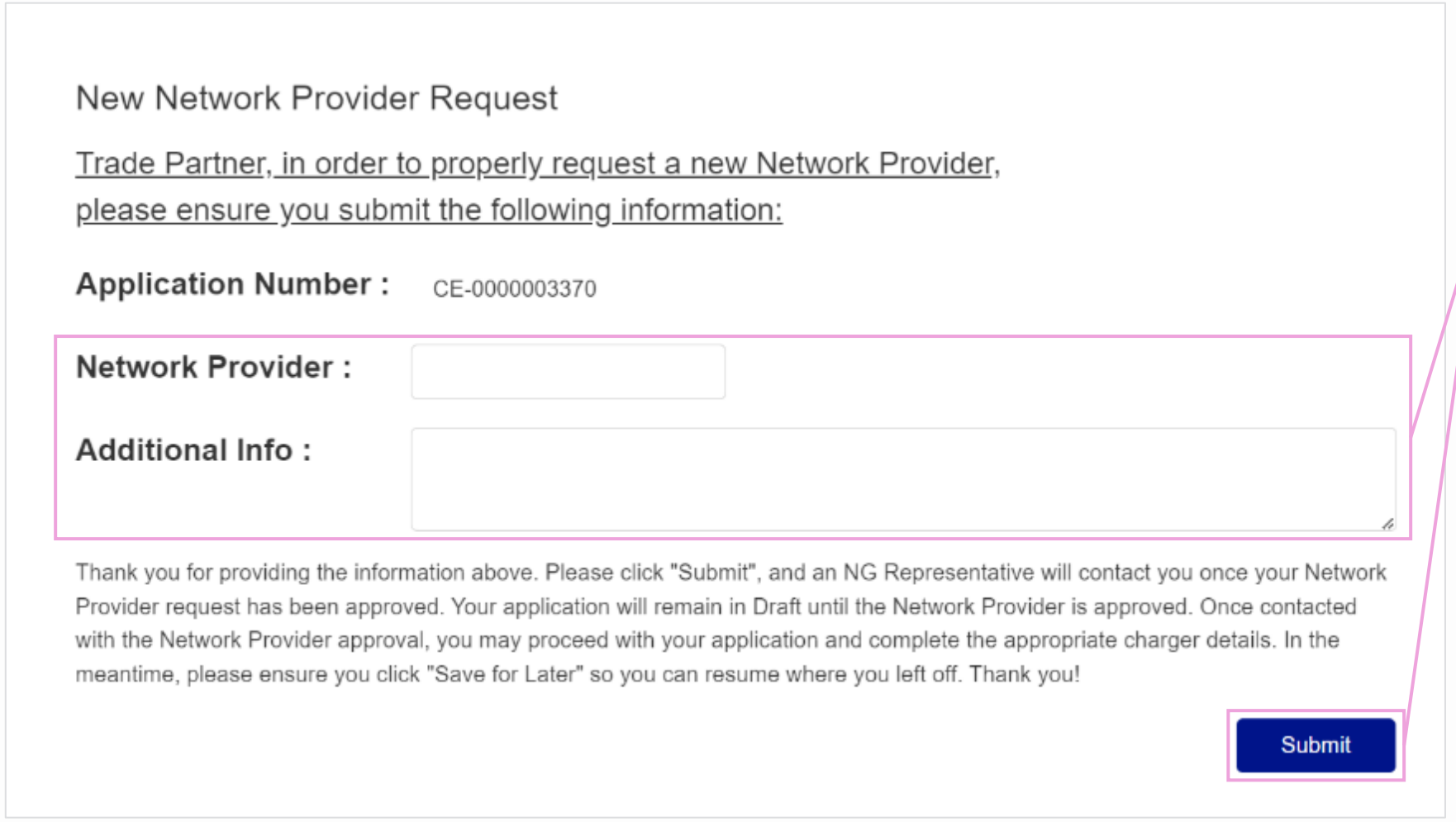
HOW TO CREATE A NEW EV APPLICATION - NY



If the required network provider is not listed in the **Network Provider** drop-down list, click the **"Don't see your network provider? Request one here!"** hyperlink.

Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY

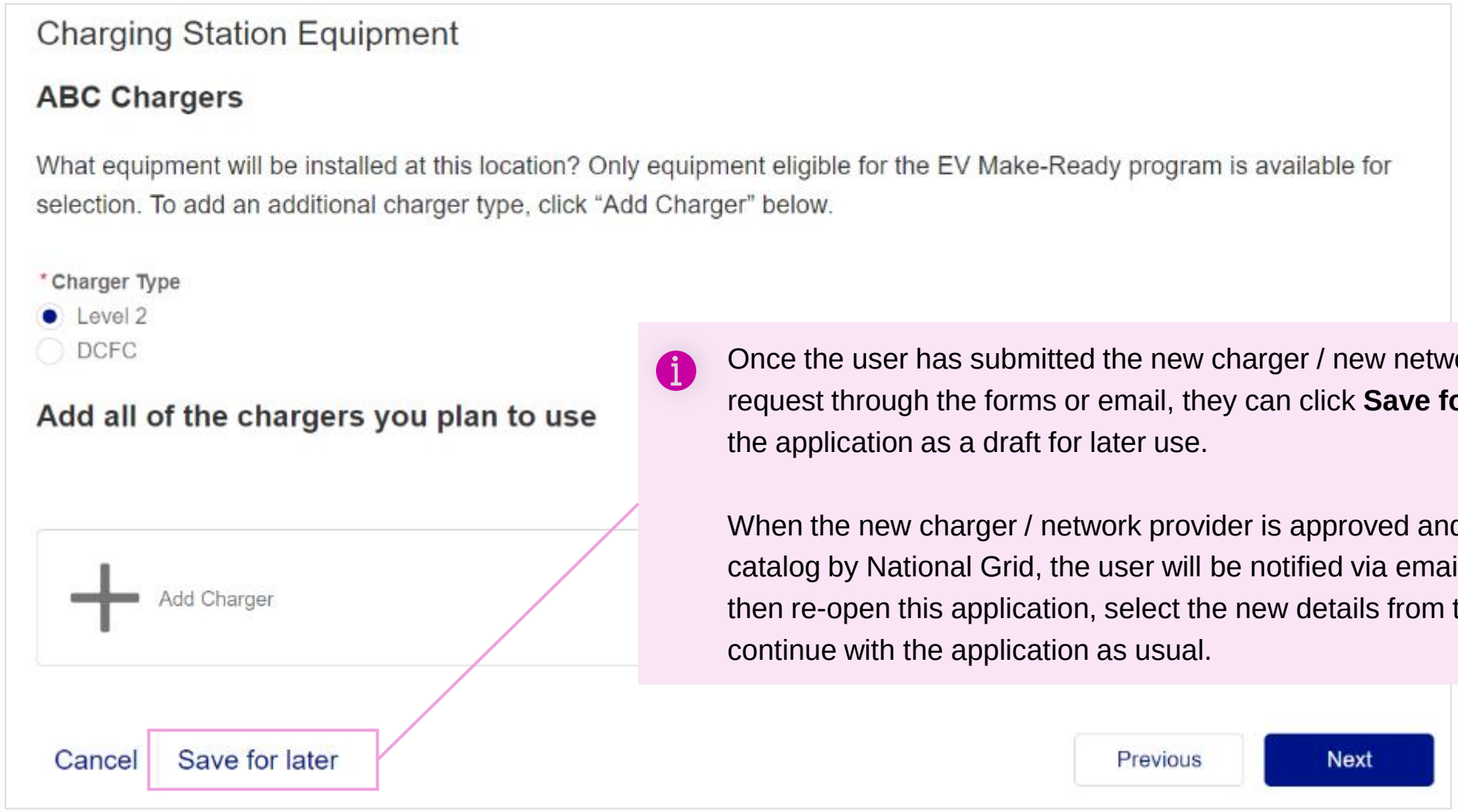


The **New Network Provider Request** form will appear in a pop-up window. Enter the new **Network Provider** and any **Additional Info**, and then click **Submit**.

Users can also send the new network provider approval request to the National Grid Program Manager or EV Analyst via email.

Step 6: Charging Station Equipment

HOW TO CREATE A NEW EV APPLICATION - NY



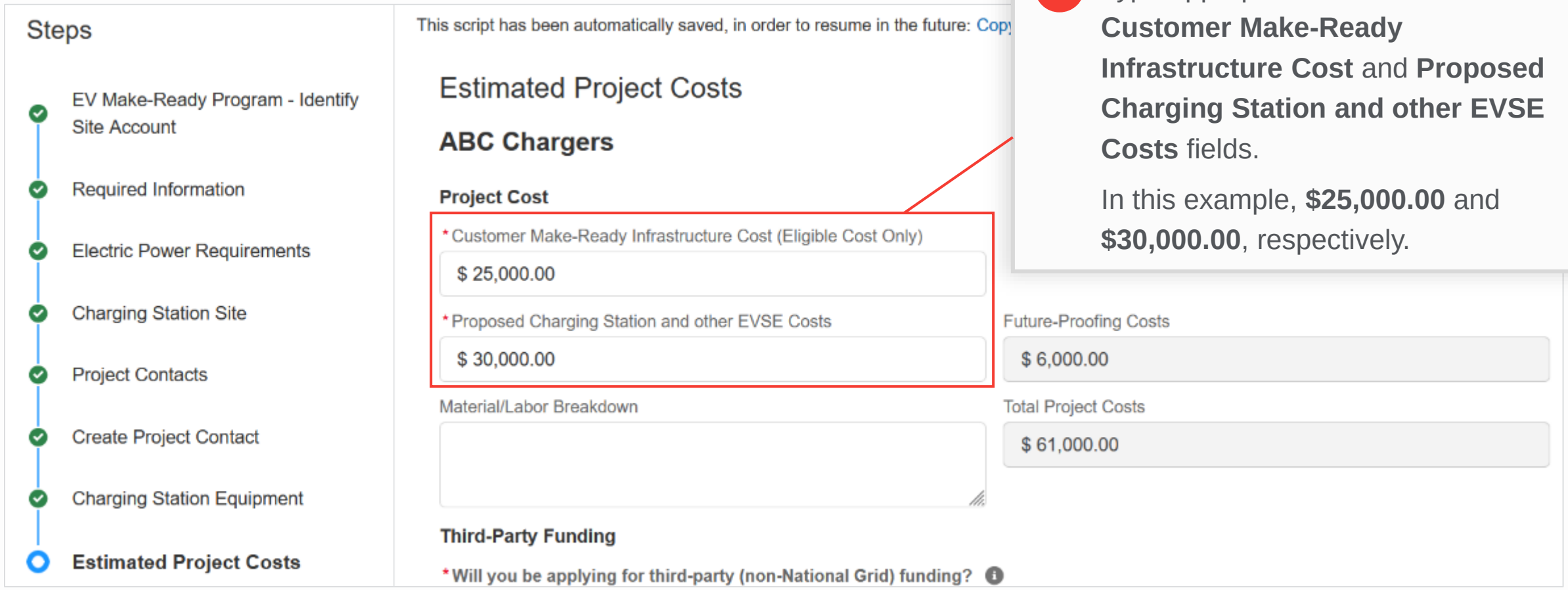
Once the user has submitted the new charger / new network provider request through the forms or email, they can click **Save for later** to save the application as a draft for later use.

When the new charger / network provider is approved and added to the catalog by National Grid, the user will be notified via email. The user can then re-open this application, select the new details from the picklists, and continue with the application as usual.

Step 7: Estimated Project Costs

HOW TO CREATE A NEW EV APPLICATION - NY

On clicking the **Next** button in step 6.13, the **Estimated Project Costs** screen will appear. Here, the user can enter the details of the project cost and third-party funding.



7.1 Type appropriate amounts in the **Customer Make-Ready Infrastructure Cost** and **Proposed Charging Station and other EVSE Costs** fields.

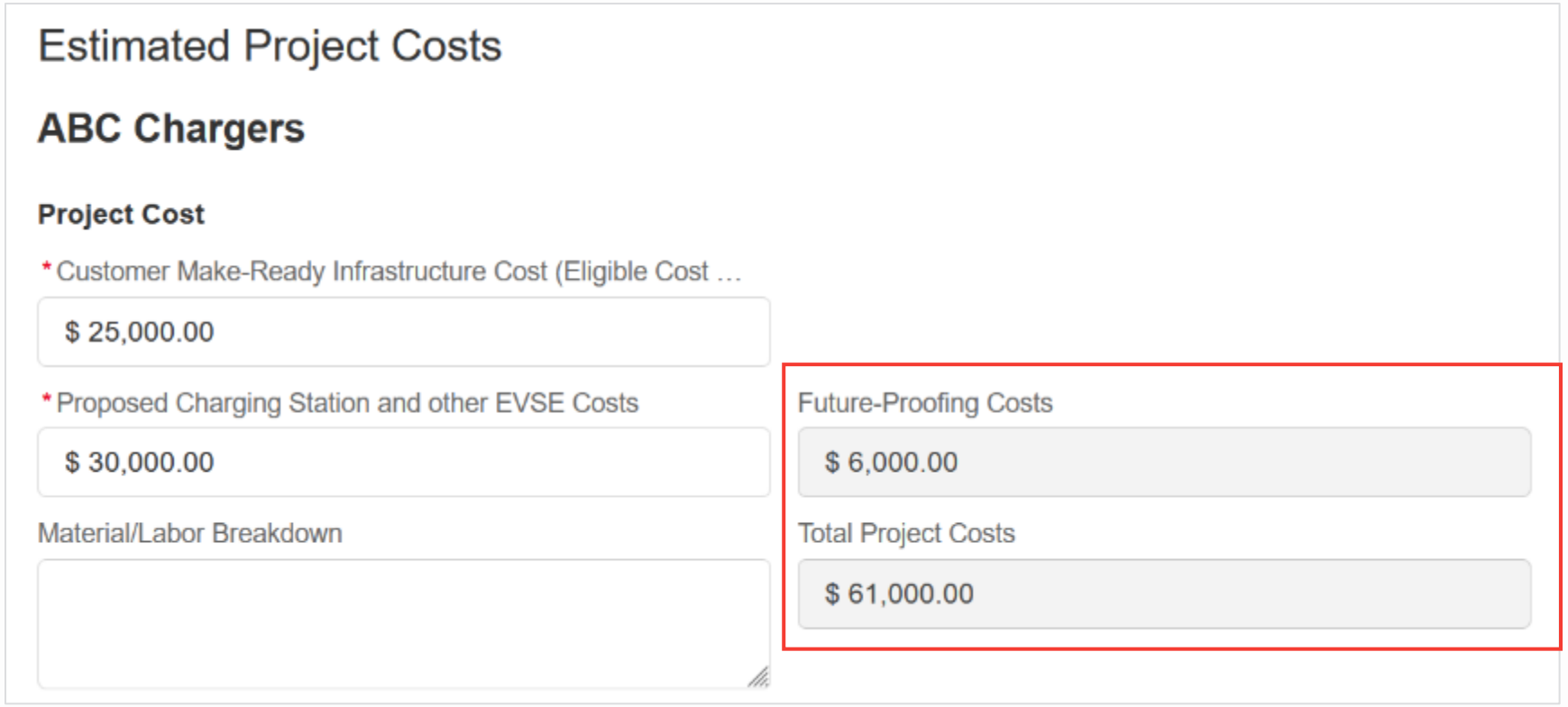
In this example, **$25,000.00** and **$30,000.00**, respectively.

Step 7: Estimated Project Costs

HOW TO CREATE A NEW EV APPLICATION - NY

The **Future-Proofing Costs** and **Total Project Cost** fields will get auto-populated. The **Future-Proofing Cost** will be what the user entered in the **Electric Power Requirements** step.

The **Total Project Cost** will be the sum of the **Customer Make-Ready Infrastructure Cost**, **Proposed Charging Station and other EVSE Costs**, and **Future-Proofing Costs**.



Step 7: Estimated Project Costs

HOW TO CREATE A NEW EV APPLICATION - NY

* Proposed Charging Station and other EVSE Costs

$ 30,000.00

Future-Proofing Costs

$ 6,000.00

Material/Labor Breakdown

Total Project Costs

$ 61,000.00

Third-Party Funding

* **Will you be applying for third-party (non-National Grid) funding?**

- Yes
- (•) No

* Please explain why not.

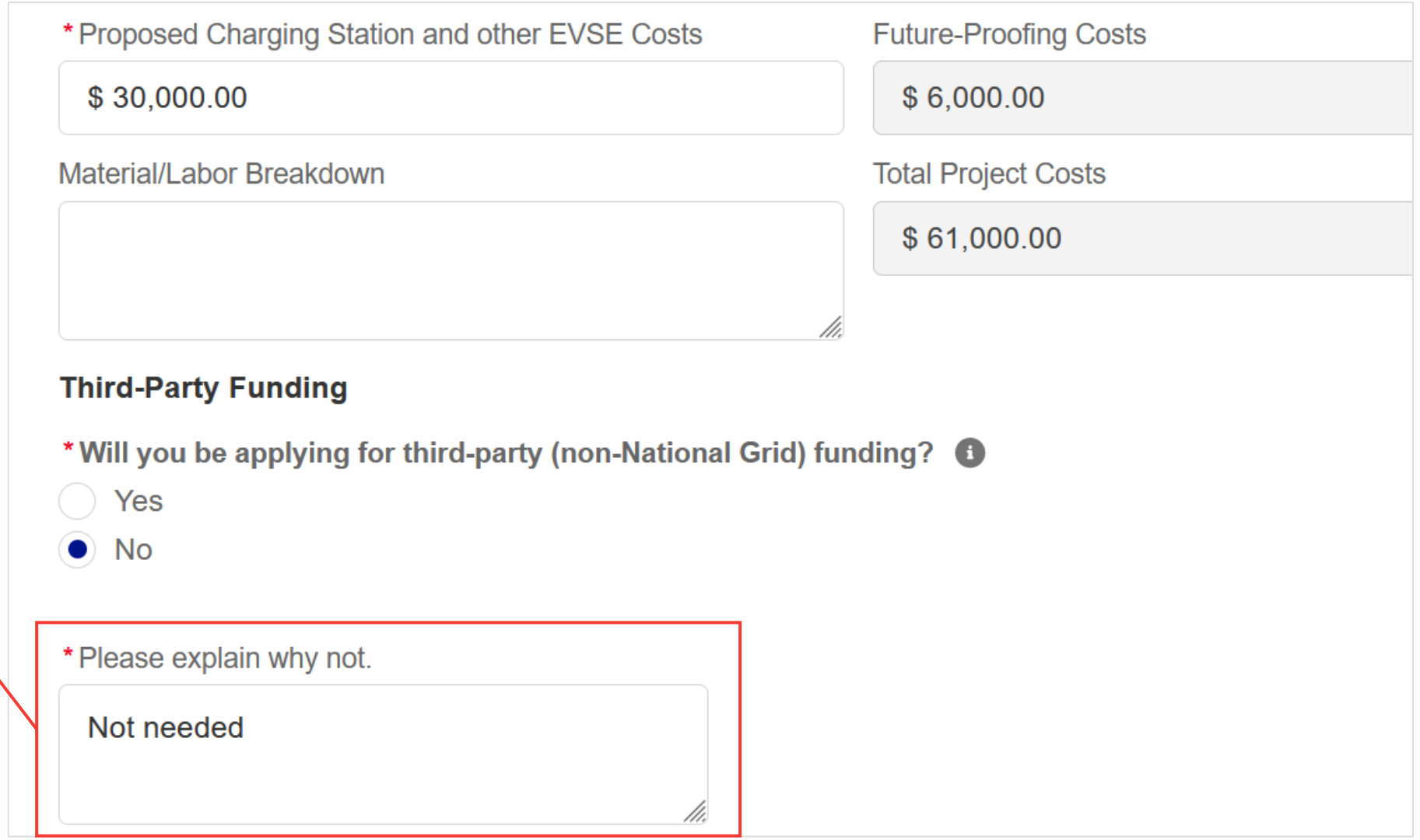
Not needed

7.2 Select the appropriate radio option for the **"Will you be applying for third-party (non-National Grid) funding?"** question. In this example, select **No**.

Step 7: Estimated Project Costs

HOW TO CREATE A NEW EV APPLICATION - NY

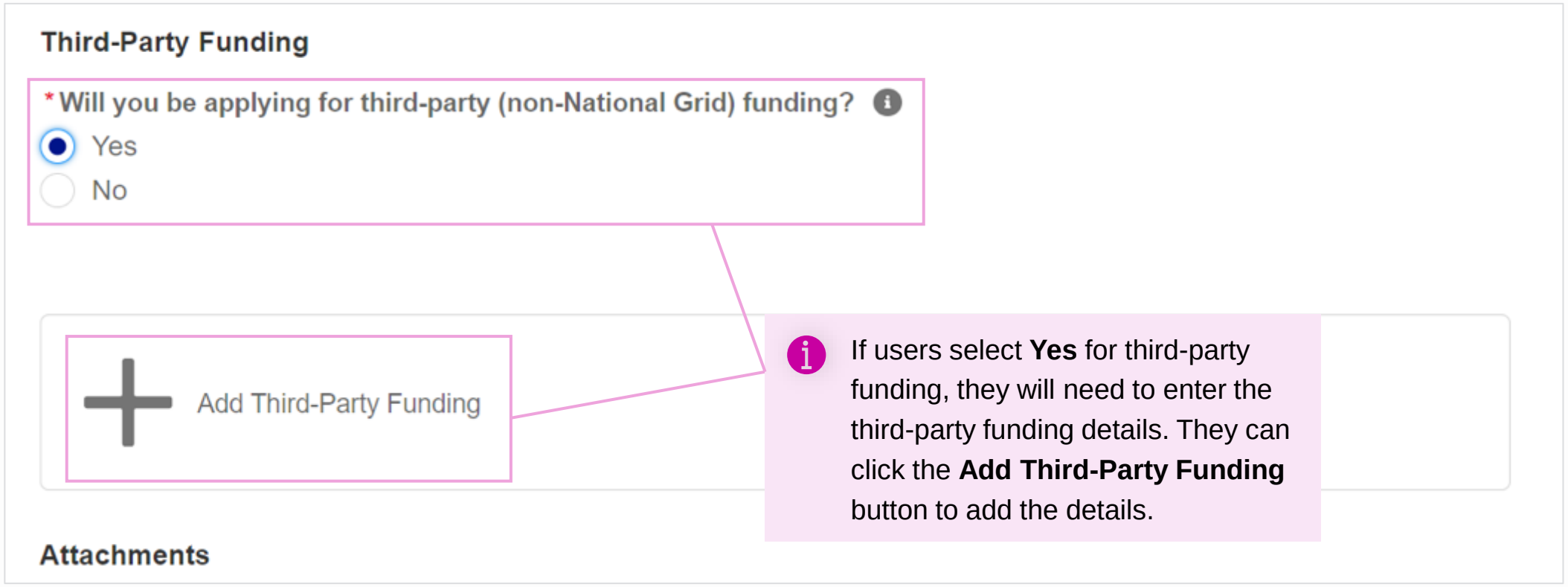
Upon selecting **No**, a new field, **“Please explain why not”** will appear.



7.3 In the **“Please explain why not”** field, add a reason for not applying for the third-party funding.

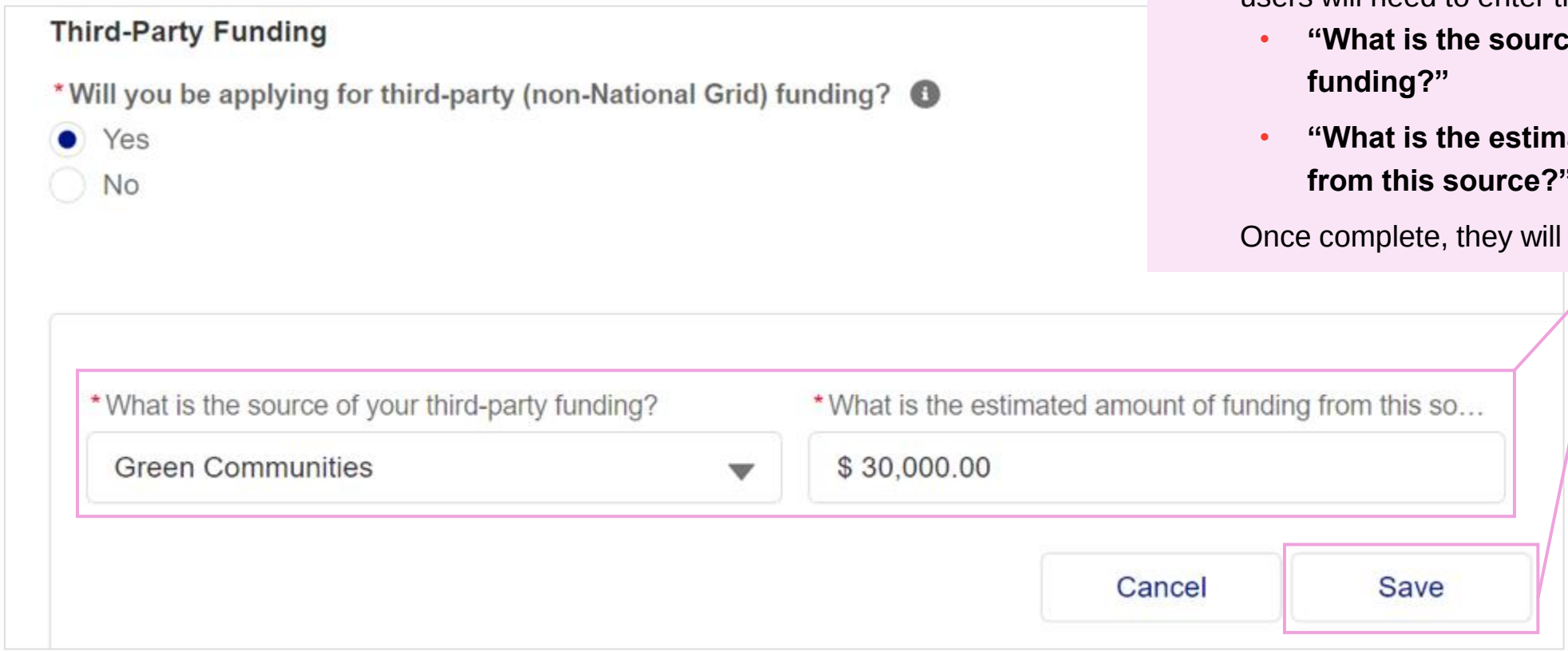
Step 7: Estimated Project Costs

HOW TO CREATE A NEW EV APPLICATION - NY



Step 7: Estimated Project Costs

HOW TO CREATE A NEW EV APPLICATION - NY



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?"**

Once complete, they will need to **Save** the details.

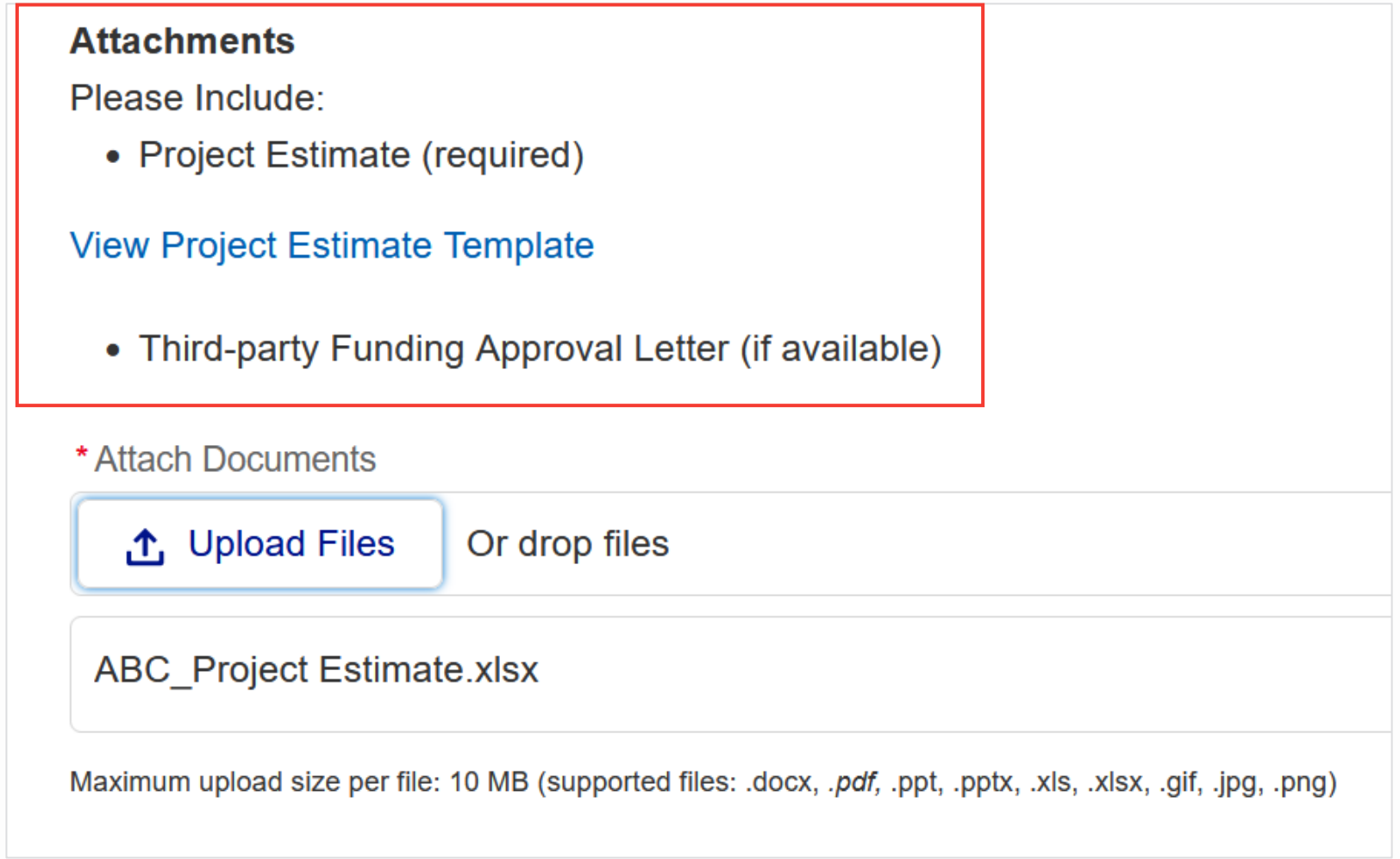
Step 7: Estimated Project Costs

HOW TO CREATE A NEW EV APPLICATION - NY

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.

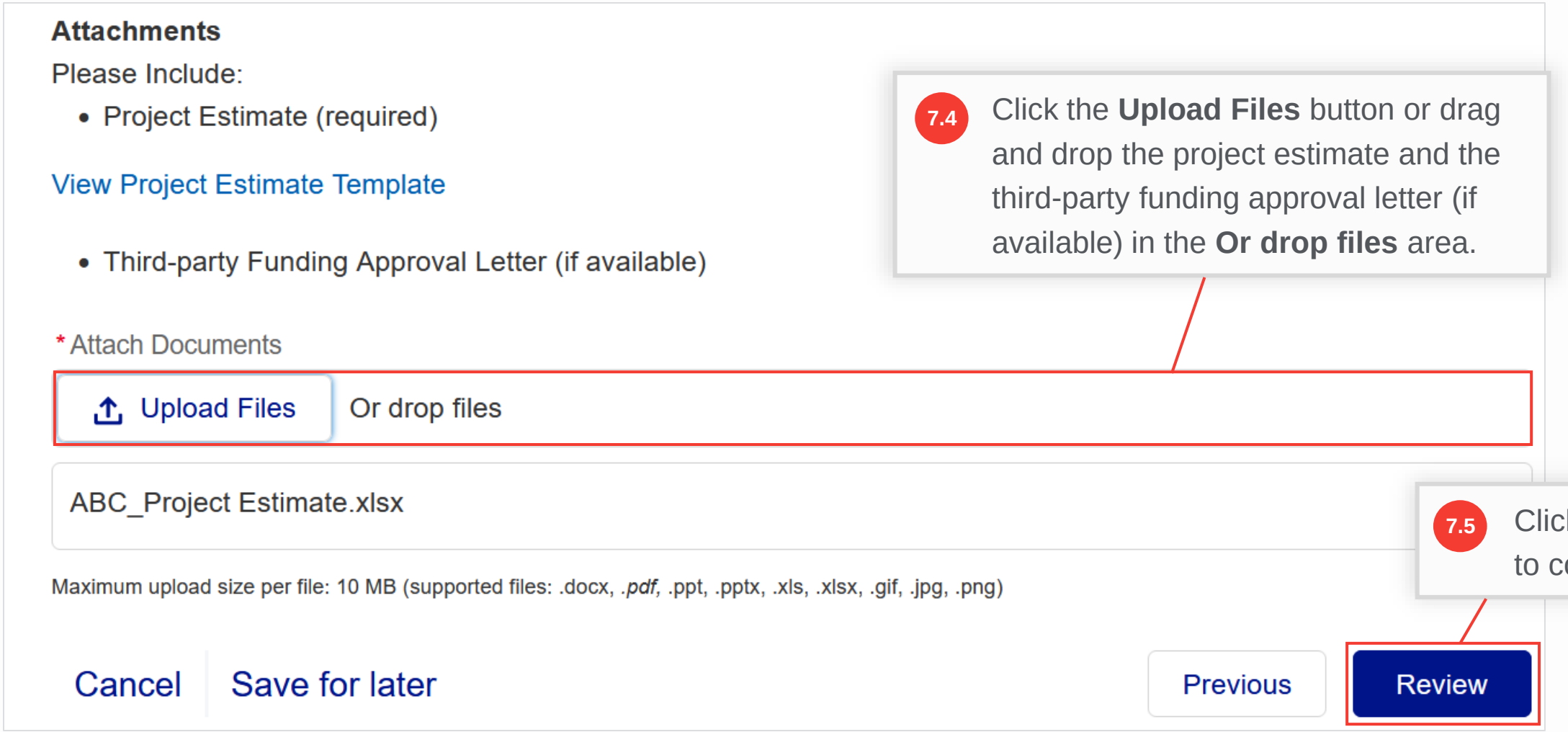
It is mandatory to attach the project estimate document to the application. If the user does not attach any documents before proceeding, they will receive an error message and the application will not move further.

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.



Step 7: Estimated Project Costs

HOW TO CREATE A NEW EV APPLICATION - NY

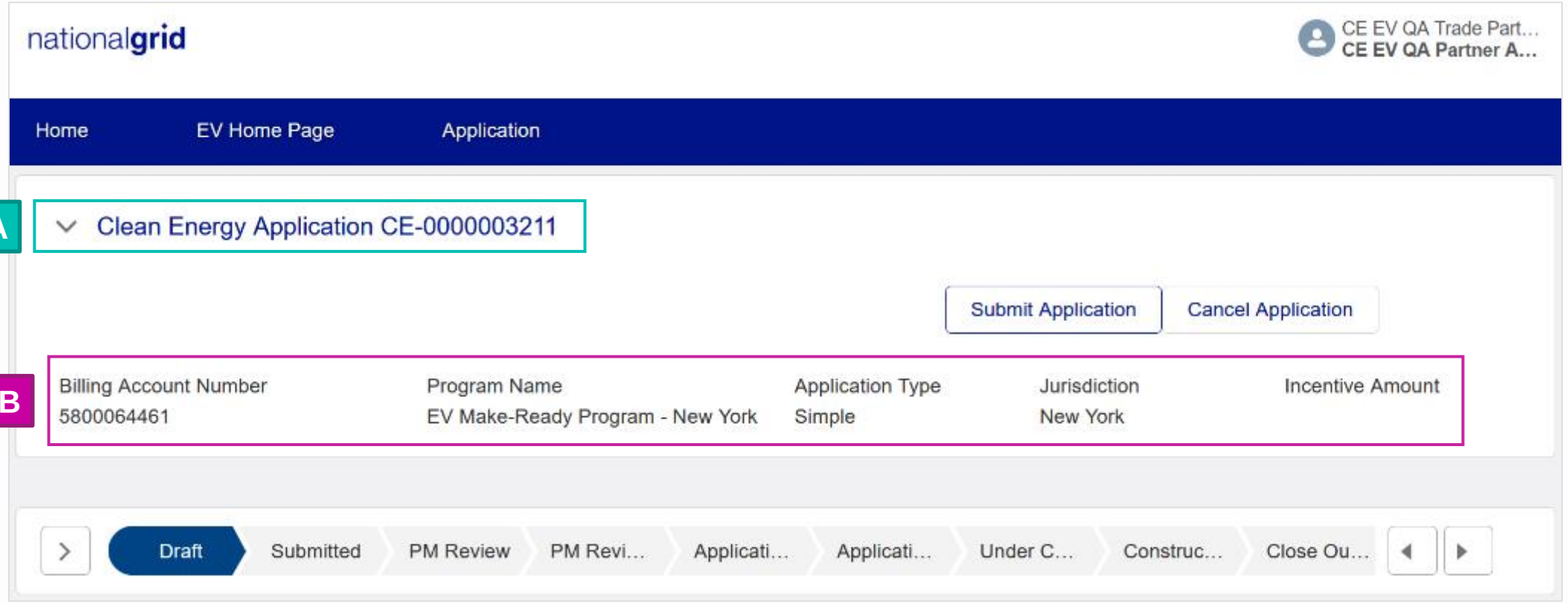


Step 8: Review and Submission

HOW TO CREATE A NEW EV APPLICATION - NY

A 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.

B Underneath, users can view their application highlights such as **Billing Account Number**, **Program Name**, **Application Type,** and **Jurisdiction**.

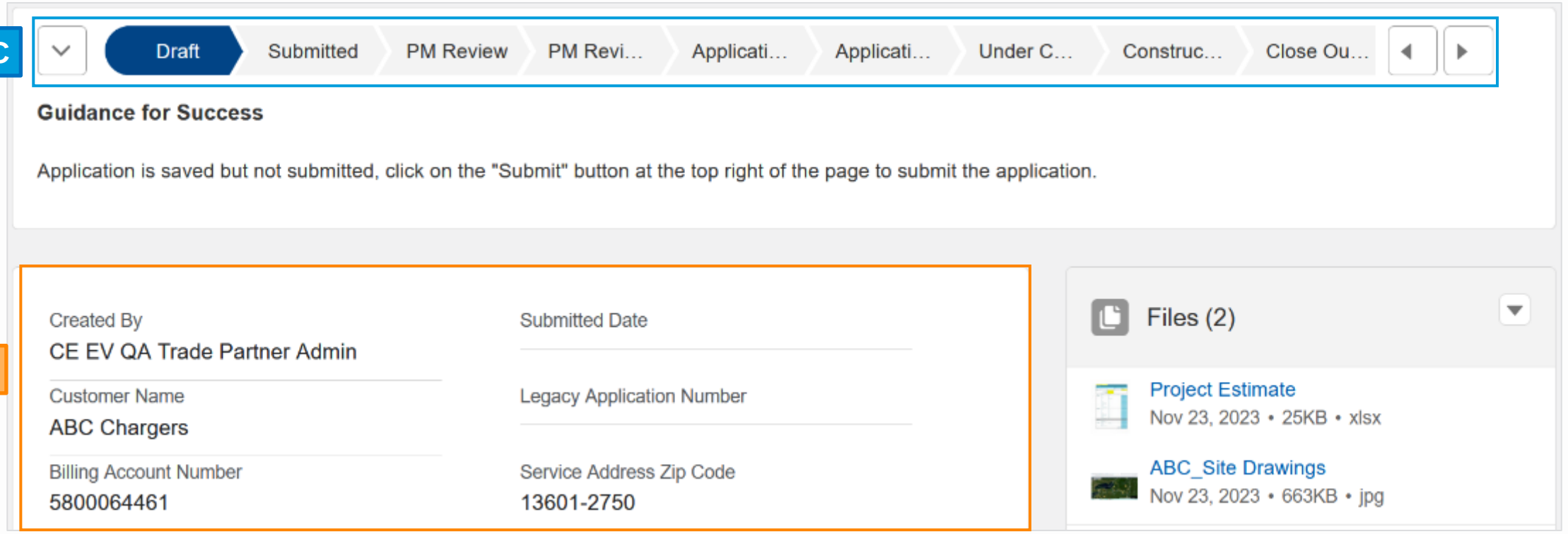


Step 8: Review and Submission

HOW TO CREATE A NEW EV APPLICATION - NY

C 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.

D 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**.

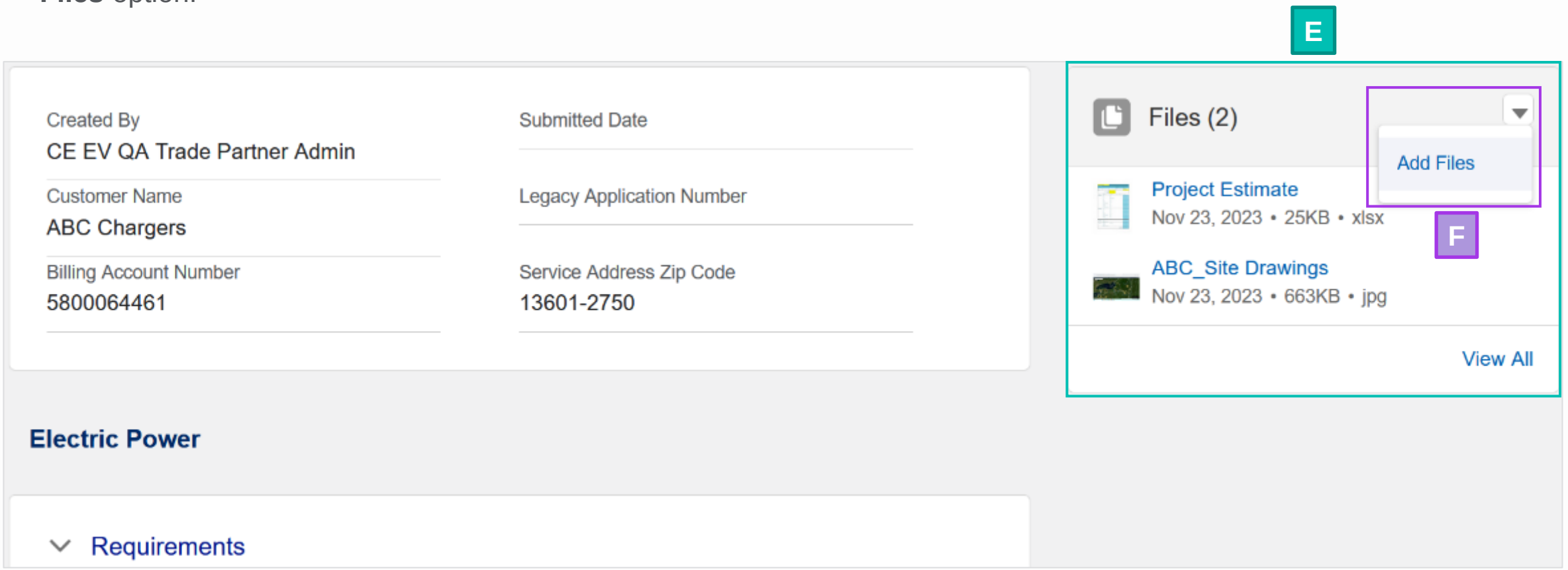


Step 8: Review and Submission

HOW TO CREATE A NEW EV APPLICATION - NY

E The **Files** section will display all files the user has attached to the application.

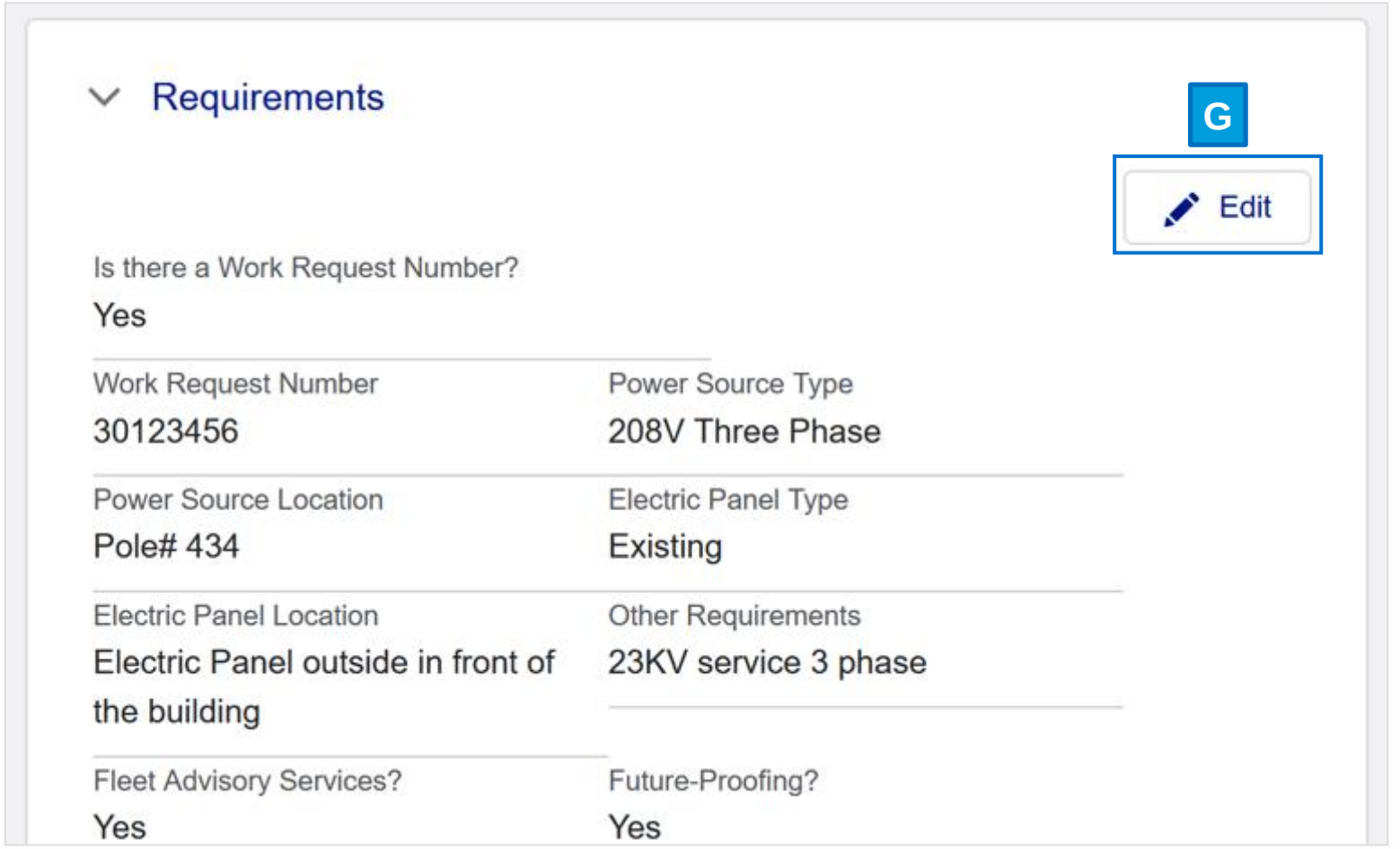
F If users want to attach additional files, they can click the drop-down arrow in the **Files** section and then select the **Add Files** option.



Step 8: Review and Submission

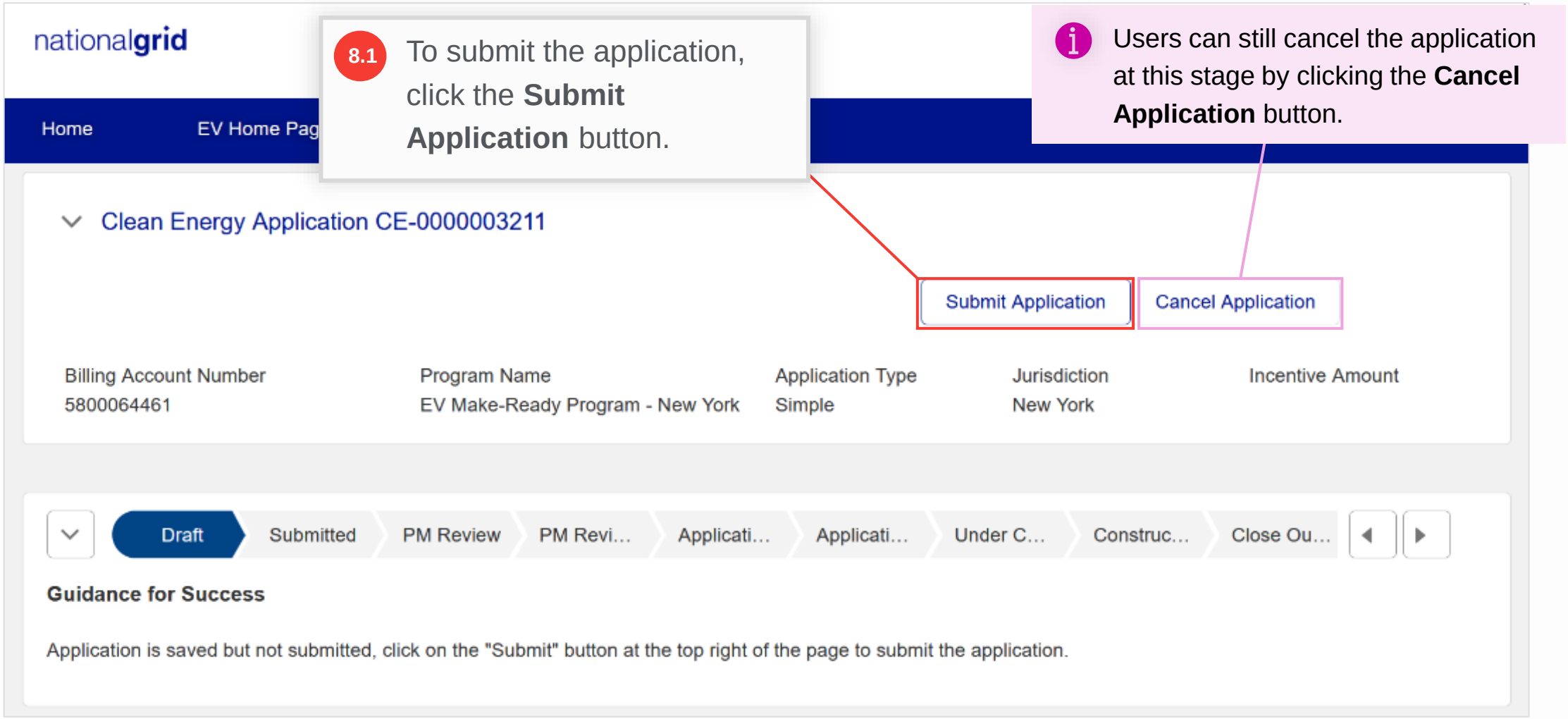
HOW TO CREATE A NEW EV APPLICATION - NY

G 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.



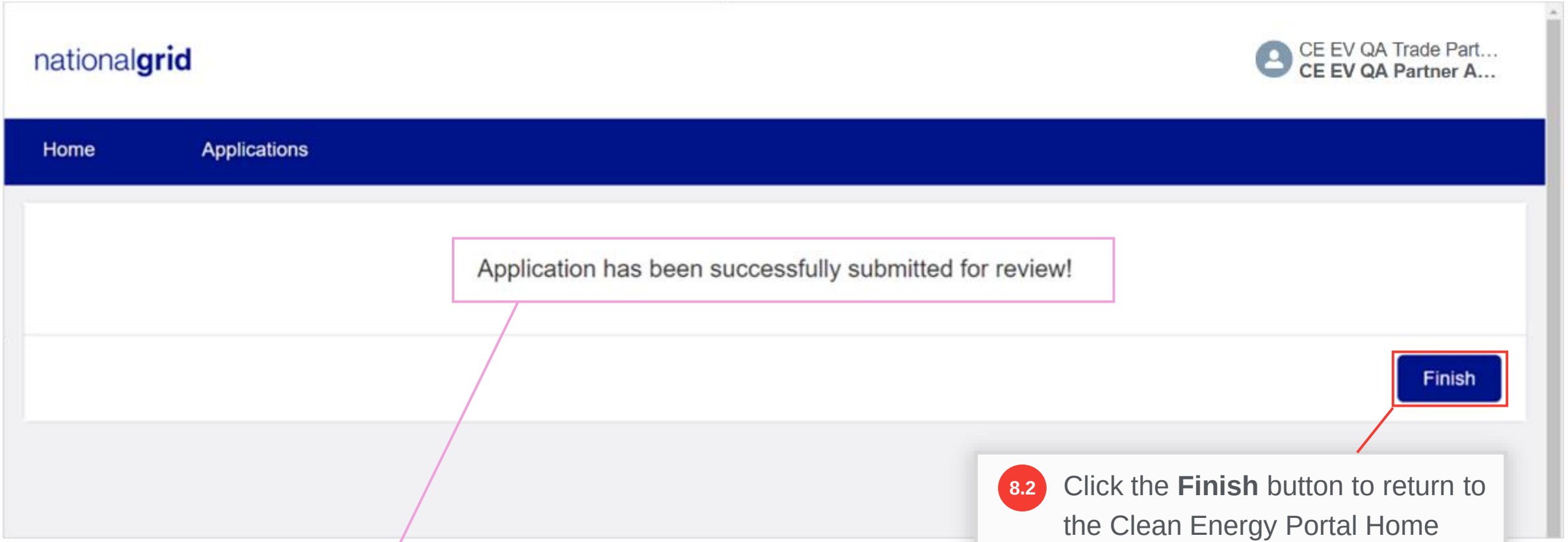
Step 8: Review and Submission

HOW TO CREATE A NEW EV APPLICATION - NY



Step 8: Review and Submission

HOW TO CREATE A NEW EV APPLICATION - NY



A message will appear that the application has been successfully submitted for review.

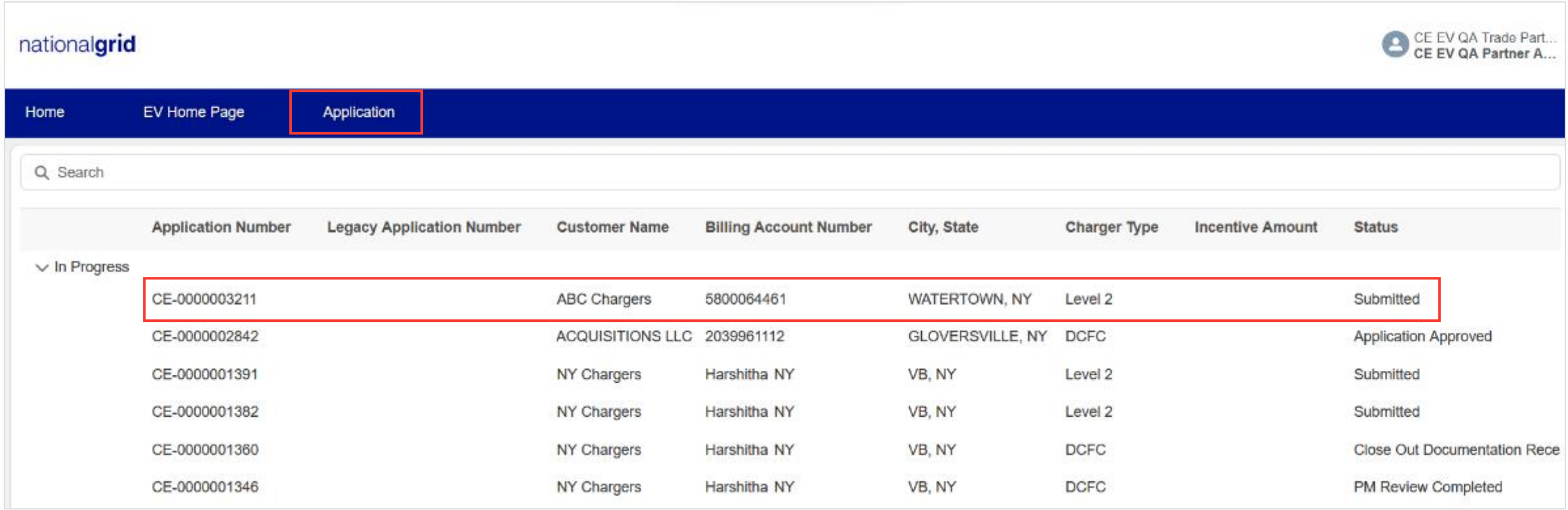
8.2 Click the **Finish** button to return to the Clean Energy Portal Home Page.

Clean Energy Portal Home Page

HOW TO CREATE A NEW EV APPLICATION - NY

Users are taken back to the Clean Energy Portal homepage. They can view their application under the **In Progress** section in the **Application** tab. Note that the status of the application is now **Submitted**.

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



	Application Number	Legacy Application Number	Customer Name	Billing Account Number	City, State	Charger Type	Incentive Amount	Status
In Progress								
	CE-0000003211		ABC Chargers	5800064461	WATERTOWN, NY	Level 2		Submitted
	CE-0000002842		ACQUISITIONS LLC	2039961112	GLOVERSVILLE, NY	DCFC		Application Approved
	CE-0000001391		NY Chargers	Harshitha NY	VB, NY	Level 2		Submitted
	CE-0000001382		NY Chargers	Harshitha NY	VB, NY	Level 2		Submitted
	CE-0000001360		NY Chargers	Harshitha NY	VB, NY	DCFC		Close Out Documentation Rece
	CE-0000001346		NY Chargers	Harshitha NY	VB, NY	DCFC		PM Review Completed

End of Procedure