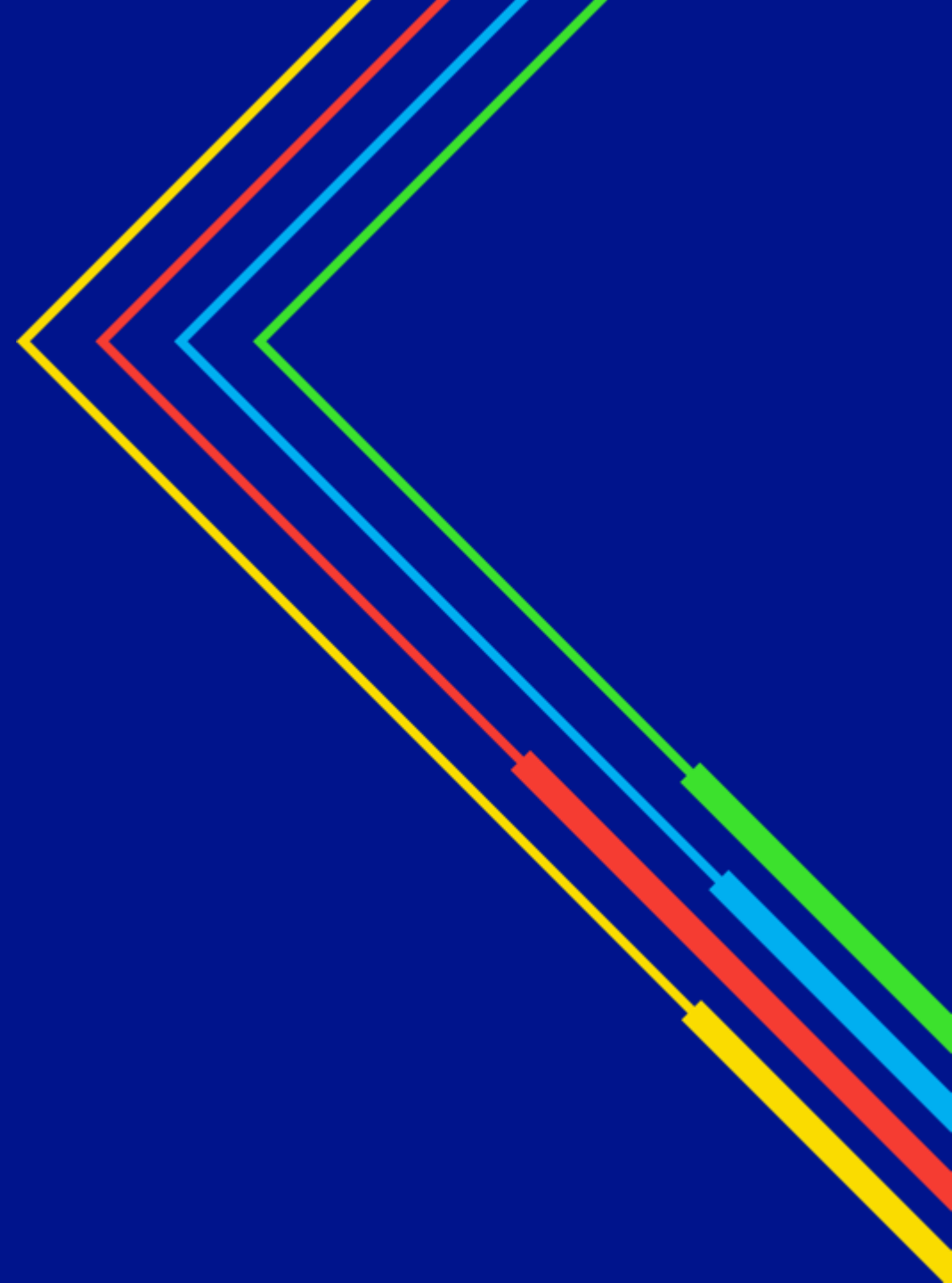


# How to Sign Terms & Conditions and Determine Incentive Assignments

EV Make-Ready – New York

November 28, 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, the user will be able to:

- Review and determine incentive assignments
- Sign Terms & Conditions

# Approval Email

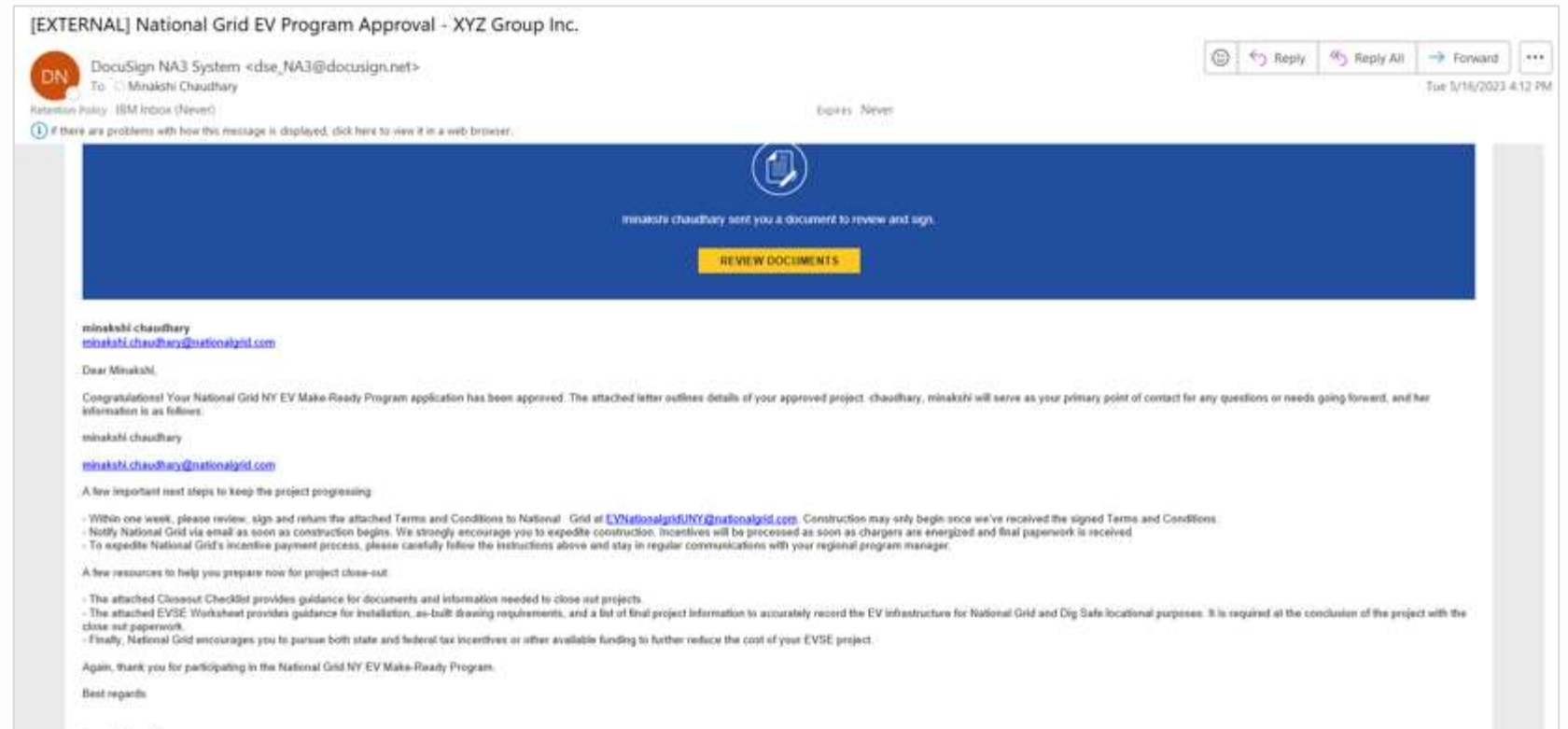
## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

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
- Project Closeout Checklist
- Project Estimate

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

[EXTERNAL] National Grid EV Program Approval - XYZ Group Inc.



DocuSign NA3 System <dse\_NA3@docusign.net>

To: Minakshi Chaudhary

Retention Policy IBM Inbox (Never)

Expires Never



Tue 5/16/2023 4:12 PM

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



minakshi chaudhary sent you a document to review and sign.

REVIEW DOCUMENTS

minakshi chaudhary  
[minakshi.chaudhary@nationalgrid.com](mailto:minakshi.chaudhary@nationalgrid.com)

Dear Minakshi,

Congratulations! Your National Grid NY EV Make-Ready Program application has been approved. The attached letter outlines details of your approved project. chaudhary. Information is as follows:

minakshi chaudhary

[minakshi.chaudhary@nationalgrid.com](mailto:minakshi.chaudhary@nationalgrid.com)

A few important next steps to keep the project progressing:

- Within one week, please review, sign and return the attached Terms and Conditions to National Grid at [EVNationalgridUNY@nationalgrid.com](mailto:EVNationalgridUNY@nationalgrid.com). Construction may only begin once we've received the signed Terms and Conditions.
- 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.

A few resources to help you prepare now for project close-out:

- The attached Closeout Checklist provides guidance for documents and information needed to close out projects.
- The attached EVSE Worksheet provides guidance for installation, as-built drawing requirements, and a list of final project information to accurately record the EV infrastructure for National Grid and Dig Safe locational purposes. It is required at the conclusion of the project with the close out paperwork.
- Finally, National Grid encourages you to pursue both state and federal tax incentives or other available funding to further reduce the cost of your EVSE project.

Again, thank you for participating in the National Grid NY EV Make-Ready Program.

Best regards

1


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

# Approval Documents

## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS


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,

Congratulations! Your National Grid NY EV Make-Ready Program application has been approved. The attached letter outlines  
[View More](#)

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

I agree to use electronic records and signatures. CONTINUE OTHER ACTIONS ▾

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

Congratulations! Your National Grid NY EV Make-Ready Program application has been approved for reimbursement as detailed below.

Application #: CE-0000000253  
Site Address: , ,  
Charger Types: 12 - DCFC  
Base Incentive: \$80400  
Future Proofing: \$30000  
Contribution In Aid of Construction (CIAC) Costs: \$0  
Total Reimbursement: \$110400

*Please review, sign and email the attached Terms and Conditions.*

# Approval Documents (cont.)

## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

After completing Step 2, the **Continue** button will get activated.

The screenshot shows an email interface with a DocuSign header. The subject is "Please Review & Act on These Documents". The sender is minakshi.chaudhary@cleanenergy20.com. The email body contains a congratulatory message about the approval of a National Grid NY EV Make-Ready Program application. At the bottom of the email, there is a table with the following details:

Application #:	CE-0000000253
Site Address:	, ,
Charger Types:	12 - DCFC
Base Incentive:	\$ 80400
Future Proofing:	\$ 30000
Contribution In Aid of Construction (CIAC) Costs:	\$ 0
Total Reimbursement:	\$ 110400

Below the email content, there is a blue action bar with a yellow arrow icon, a checked checkbox for "I agree to use electronic records and signatures.", a yellow "CONTINUE" button, and a dropdown menu for "OTHER ACTIONS". A red box highlights the "CONTINUE" button, and a callout box with a red circle containing the number "3" points to it, stating "Click Continue to proceed."

# View Approval Letter

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

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

The screenshot displays a DocuSign envelope interface. At the top, a blue header contains the text "Please review the documents below." and two buttons: "FINISH" (yellow) and "OTHER ACTIONS" (blue with a dropdown arrow). Below the header is a toolbar with icons for search, zoom, download, print, and help. The main content area shows a document preview with the following text:

DocuSign Envelope ID: 761DA6E6-FABB-485A-9E1B-9DDBD7C938EE

**nationalgrid**

*minakshi chaudhary*

*minakshi.chaudhary@nationalgrid.com*

Minakshi Chaudhary  
XYZ Group Inc.

5/16/2023

RE: EV Charging Station Approval for

Dear Minakshi

Congratulations! Your National Grid NY EV Make-Ready Program application has been

A red callout box with a red circle containing the number "4" points to the vertical scrollbar on the right side of the document preview, with the text: "Scroll through the approval letter to review it."

START

7

# View Approval Letter (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Please review the documents below.

**FINISH** **OTHER ACTIONS ▾**

START

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Congratulations! Your National Grid NY EV Make-Ready Program application has been approved for reimbursement as detailed below.

Application #: CE-0000000253  
Site Address: , ,  
Charger Types: 12 - DCFC  
Base Incentive: \$ 80400  
Future Proofing: \$ 30000  
Contribution In Aid of Construction (CIAC) Costs: \$ 0  
Total Reimbursement: \$ 110400

5 Be sure to review the approved application and incentive details in the letter.

*Please review, sign and email the attached Terms and Conditions.*

Construction may begin as soon as we confirm that we have received the **signed Terms and Conditions**. Please notify National Grid when construction begins on this project. You will have **1 year** from the date of this approval letter to complete construction of the EV charging stations.

Please review "Close Out Checklist" document that will be sent to you. This document provides guidance for installation, requirements for as-built drawings and a list of final project



# Review Terms & Conditions

## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Please review the documents below.

**FINISH** **OTHER ACTIONS ▾**

START

### NATIONAL GRID ELECTRIC VEHICLE INFRASTRUCTURE MAKE-READY PROGRAM PARTICIPANT TERMS AND CONDITIONS

The Participant agrees to participate in the National Grid Electric Vehicle Infrastructure Make-Ready Program ("Make-Ready Program") offered by Niagara Mohawk Power Corporation 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 the ownership of, with right to vote, 50% or more of the outstanding voting securities, equity, membership interests, or equivalent, of such Person.
  - 1.2 "Agreement" means the Application, these Terms and Conditions and any exhibits and attachments which are incorporated and made a part of this Agreement.
  - 1.3 "Application" means the National Grid Electric Vehicle Infrastructure Make-Ready Program Application, including any attachments, exhibits, and these Terms and Conditions.
  - 1.4 "Approved Contractor" means a contractor who has met the utility's approval criteria to install EV charging infrastructure incentivized through the Make-Ready Program.
  - 1.5 "Make-Ready Electric Upgrades" means (i) National Grid Electric Distribution System Upgrades and (ii) Participant's Electric Distribution System Upgrades.
  - 1.6 "National Grid Electric Distribution System Upgrades" means electrical infrastructure that is required to install new EVSE, owned and operated by National Grid, including, but not limited to, transformers, and new or upgraded electric services.
  - 1.7 "Participant's Electric Distribution System Upgrades" means electric infrastructure that is required to install new EVSE, owned and operated by an entity other than National Grid, including, but not limited to, installation of wire and conduit, transformers, or mounting hardware from the Participant's electrical panel to the EVSE stub.
  - 1.8 "Make-Ready Program Incentive" means National Grid's financial contributions toward the Make-Ready Electric Upgrades as defined above.
  - 1.9 "EVSE" means the Electric Vehicle Supply Equipment.
  - 1.10 "Equipment" means the EVSE and Participant's Electric Distribution System Upgrades.
  - 1.11 "Equipment Activation Date" means the date upon which the Participant activates the Equipment installed on the Site as indicated in the section of the Application entitled "Term".

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6

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

# Sign Terms & Conditions

## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Enter text FINISH OTHER ACTIONS ▾

START

22. **Assignment.**  
This Agreement may not be assigned by the Participant without the express written consent of National Grid.


23. **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 Participant and National Grid.

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

25. **Entire Agreement.**  
This Agreement constitutes the entire agreement between National Grid and the Participant 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.

Participant has read, understands and agrees to these Terms and Conditions

**Participant**

**Signature:** 

**Printed Name:**

**Date:**

**7** Enter the Facility Contact's name in the **Participant** and **Printed Name** fields.

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

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# Sign Terms & Conditions (cont.)

## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Enter text **FINISH** OTHER ACTIONS ▾

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22. **Assignment.**  
This Agreement may not be assigned by the Participant without the express written consent of National Grid.

23. **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 Participant and National Grid.

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

25. **Entire Agreement.**  
This Agreement constitutes the entire agreement between National Grid and the Participant 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.

Participant has read, understands and agrees to these Terms and Conditions

**Participant**

Signature:

Printed Name:

Date:

**START** **Sign** ⬇️

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

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# Sign Terms & Conditions (cont.)

## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

If the user is signing a document via DocuSign for the first time, they will need to add their signature first.

The screenshot shows the 'Adopt Your Signature' dialog box in DocuSign. The dialog has a title bar with 'Adopt Your Signature' and a close button. Below the title, there is a section for 'Confirm your name, initials, and signature.' with a '\* Required' label. The 'Full Name\*' field contains 'Minakshi Chaudhary'. Below the name field are three buttons: 'SELECT STYLE' (highlighted with a pink box), 'DRAW', and 'UPLOAD'. A pink callout box with an information icon points to the 'SELECT STYLE' button, containing the text: 'The user can either select a suggested style or draw / upload their signature. In this example, we've selected a style.' Below the buttons is a 'PREVIEW' section showing a signature 'Minakshi Chaudhary' and initials 'MC' next to a 'DS' logo. A 'Change Style' button is highlighted with a red box. A red callout box with the number '9' points to the 'Change Style' button, containing the text: 'Click **Change Style** to choose a style to use.' At the bottom of the dialog are two buttons: 'ADOPT AND SIGN' (yellow) and 'CANCEL'. The background shows a 'START' button and a 'DocuSign' logo.

Select the sign

### Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

Full Name\*

Minakshi Chaudhary

**SELECT STYLE** DRAW UPLOAD

PREVIEW

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 (my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper s

ADOPT AND SIGN CANCEL

DocuSign

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ACTIONS

START

9 Click **Change Style** to choose a style to use.

The user can either select a suggested style or draw / upload their signature. In this example, we've selected a style.

Change Style

# Sign Terms & Conditions (cont.)

## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Some suggested styles will appear on the right.

Select the sign

### Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

Full Name\*

Minakshi Chaudhary

SELECT STYLE

PREVIEW

DocuSigned by:  
Minakshi Chaudhary  
F5D3A41EC0E1418...

DS  
MC

By selecting Adopt and Sign, I agree that the signature and initials will be the elect (my agent) use them on documents, including legally binding contracts - just the si

ADOPT AND SIGN CANCEL

DocuSign

DocuSigned by:  
Minakshi Chaudhary  
F5D3A41EC0E1418...

DS  
MC

DocuSigned by:  
Minakshi Chaudhary  
F5D3A41EC0E1418...

DS  
MC

DocuSigned by:  
Minakshi Chaudhary  
F5D3A41EC0E1418...

DS

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10 Click a style to select it.

# Sign Terms & Conditions (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Select the sign

START

## Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

Full Name\*

Initials\*

**SELECT STYLE** DRAW UPLOAD

PREVIEW [Change Style](#)

DocuSigned by:  
*Minakshi Chaudhary*  
F5D3A41EC0E1418...

DS  
*MC*

By selecting Adopt and Sign, I (or my agent) use them on documents as a representation of my signature and initials for all purposes when I (or my agent) use them on documents as a pen-and-paper signature or initial.

**ADOPT AND SIGN** CANCEL

11 Click **ADOPT AND SIGN** to continue.

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# Sign Terms & Conditions (cont.)

## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Enter text

**FINISH** **OTHER ACTIONS** ▾

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

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

**25. Entire Agreement.**  
This Agreement constitutes the entire agreement between National Grid and the Participant 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.

Participant has read, understands and agrees to these Terms and Conditions

**Participant**

**Signature:**

**Printed Name:**

**Date:**

**NEXT**

**i** The signature will be added to the document.

DocuSign

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# Enter Incentive Assignment Details

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Enter text FINISH OTHER ACTIONS ▾

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**Customer Assignment of Incentive Form**

This document certifies XYZ Group Inc. 's explicit authorization for National Grid to pay  
(Customer's Name)

\$ 110400 to  for the project  
(Program Incentive Amount) (Entity, Company)

EV Application # EV- CE-0000000253  
(Application Number)

**Entity to Receive Incentive Payment**

Company Name:

Individual Name:

NEXT

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12

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



# Enter Incentive Assignment Details (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

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

The screenshot displays the 'Customer Assignment of Incentive Form' interface. The form is titled 'Customer Assignment of Incentive Form' and contains the following pre-filled information:

- This document certifies XYZ Group Inc.'s explicit authorization for National Grid to pay  
(Customer's Name)
- \$ 110400 to XYZ Group Inc. for the project  
(Program Incentive Amount) (Entity, Company)
- EV Application # EV- CE-0000000253  
(Application Number)

Below the main form is the 'Entity to Receive Incentive Payment' section, which includes input fields for 'Company Name' and 'Individual Name'.

A callout box with a red circle containing the number '13' points to the 'Entity, Company' field. The text in the callout box reads: 'Enter the company name to which the incentive will be paid out, in the **Entity, Company** field. It is a required field.'

The interface includes a 'NEXT' button on the left and 'FINISH' and 'OTHER ACTIONS' buttons on the right. The DocuSign logo and footer information are visible at the bottom.

# Enter Incentive Assignment Details (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

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

Entity to Receive Incentive Payment

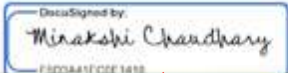
Company Name: XYZ Group Inc.

Individual Name: Minakshi Chaudhary

Company Address: Idlewood Blvd, Baldwinsville, NY

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

Customer Name: XYZ Group Inc.

Customer Signature:  Date: 5/16/2023

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

- **Company Name**
- **Individual Name**
- **Company Address**

15 Add the **Signature**.

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

DocuSign language - English (US) | Terms Of Use & Privacy | Copyright © 2023 DocuSign 23 new notifications

# Review the Project Closeout Checklist

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Done! Select Finish to send the completed document.

**FINISH** OTHER ACTIONS ▾

DocuSign Envelope ID: 761DA6E6-FABB-485A-9E1B-9DD8D7C938EE

**nationalgrid**

Upstate New York  
**Electric Vehicle Charging  
Station Make-Ready Program**

**16** Review the **Project Closeout Checklist**.

**Project Closeout Checklist**

Customers or installation contractors acting on behalf of the customer will need to provide the following forms and documents. All documents are required by National Grid prior to issuing the EV-MRP incentive payment. Please be sure documents are labeled using proper naming conventions with EV number (i.e., 123456 - Document Name). Once received, incentive payments can be made in as little as 10-15 business days.

**Project Quote Form** – Must use the [Project Quote Form](#) provided by National Grid updated with final as-built costs

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# Review the Project Cost Estimate

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

Please review the documents below. FINISH OTHER ACTIONS ▾

START

**Contractor Company Name**

**Project Cost Detail**

Street Address P: Phone Number Email

City, State ZIP Code F: Fax Number Website

Bill To: Phone:

Address:

Project Details

# plugs	
# stations	
General description of the site	
Ft of trenching	
Notable details	
Futureproofing description - if applicable	

Item #	Description	Detail/Notes				
Infrastructure Make-Ready costs	Permits	Labor			\$	-
	Permits	Materials			\$	-
	Trenching	Labor			\$	-
	Trenching	Materials (backfill, asphalt, concrete, pads, etc.)			\$	-

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17 Scroll through the remaining document to review the **Project Cost Estimate**. This is the same estimate the EV Trade Partner uploaded while submitting the application.

# Finish Document Signing

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

The screenshot shows a DocuSign document review interface. At the top, a blue header contains the text "Please review the documents below." and two buttons: "FINISH" (highlighted with a red box) 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 displays two light blue boxes with text: "\* Make-Ready Total should match the amount in the field Customer Make Ready Infrastructure Cost in portal EV application." and "\*\* Future Proofing Total should reflect only future proofing costs associated with project and should match the amount in the Future Proofing Cost field in the portal EV application." A yellow "START" button is on the left. At the bottom, a grey bar contains the text "Project Estimate" and a yellow "FINISH" button (highlighted with a red box). A callout box with a red circle containing the number "18" points to the "FINISH" button at the bottom, containing the text: "Finally, select either **FINISH** button to officially sign the documents." The footer includes the DocuSign logo, "Change Language - English (US)", "Terms Of Use & Privacy", and "Copyright © 2023 DocuSign Inc. | V2R".

Please review the documents below.

**FINISH** OTHER ACTIONS ▾

\* Make-Ready Total should match the amount in the field Customer Make Ready Infrastructure Cost in portal EV application.

\*\* Future Proofing Total should reflect only future proofing costs associated with project and should match the amount in the Future Proofing Cost field in the portal EV application.

START

Project Estimate

**FINISH**

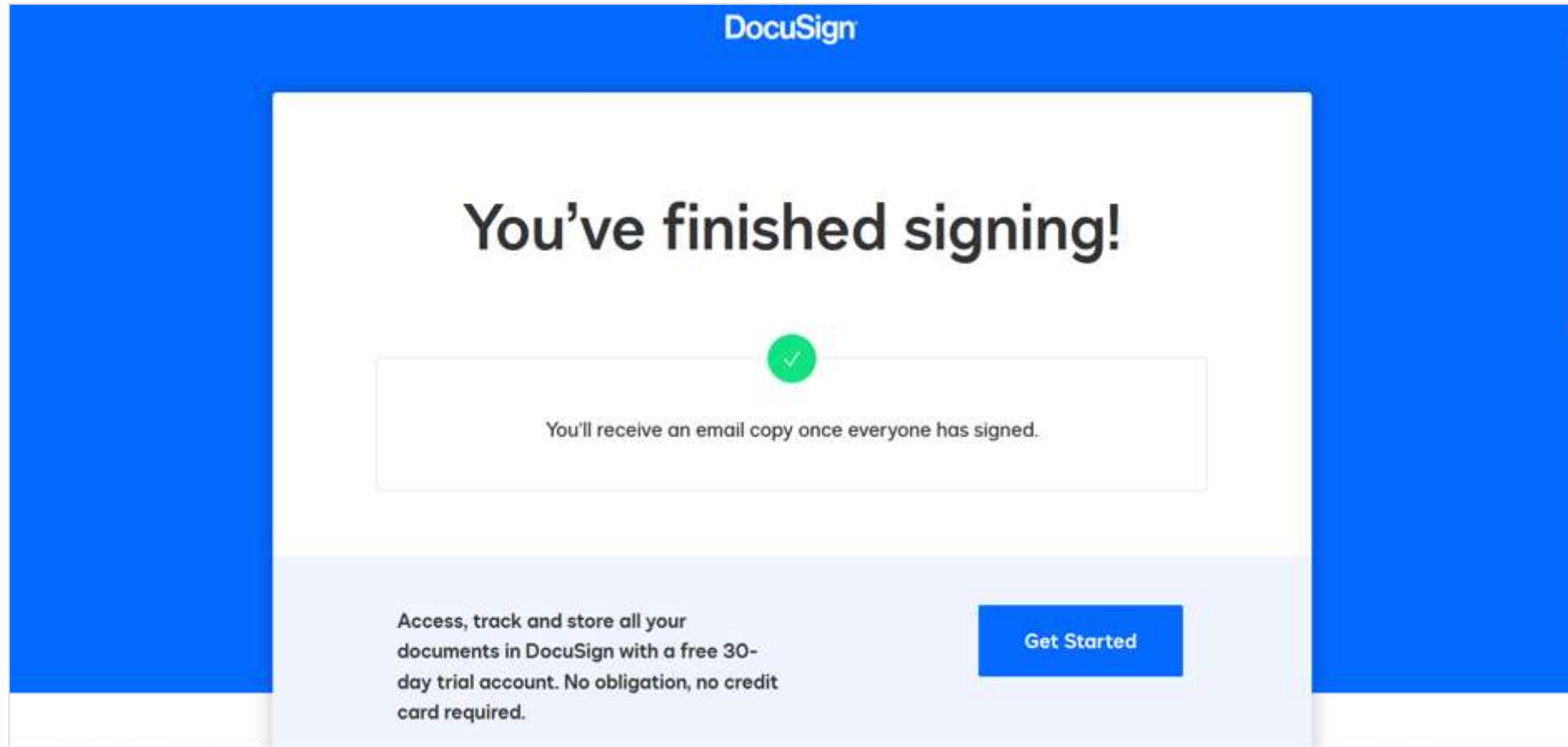
18 Finally, select either **FINISH** button to officially sign the documents.

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# Finish Document Signing (cont.)

HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

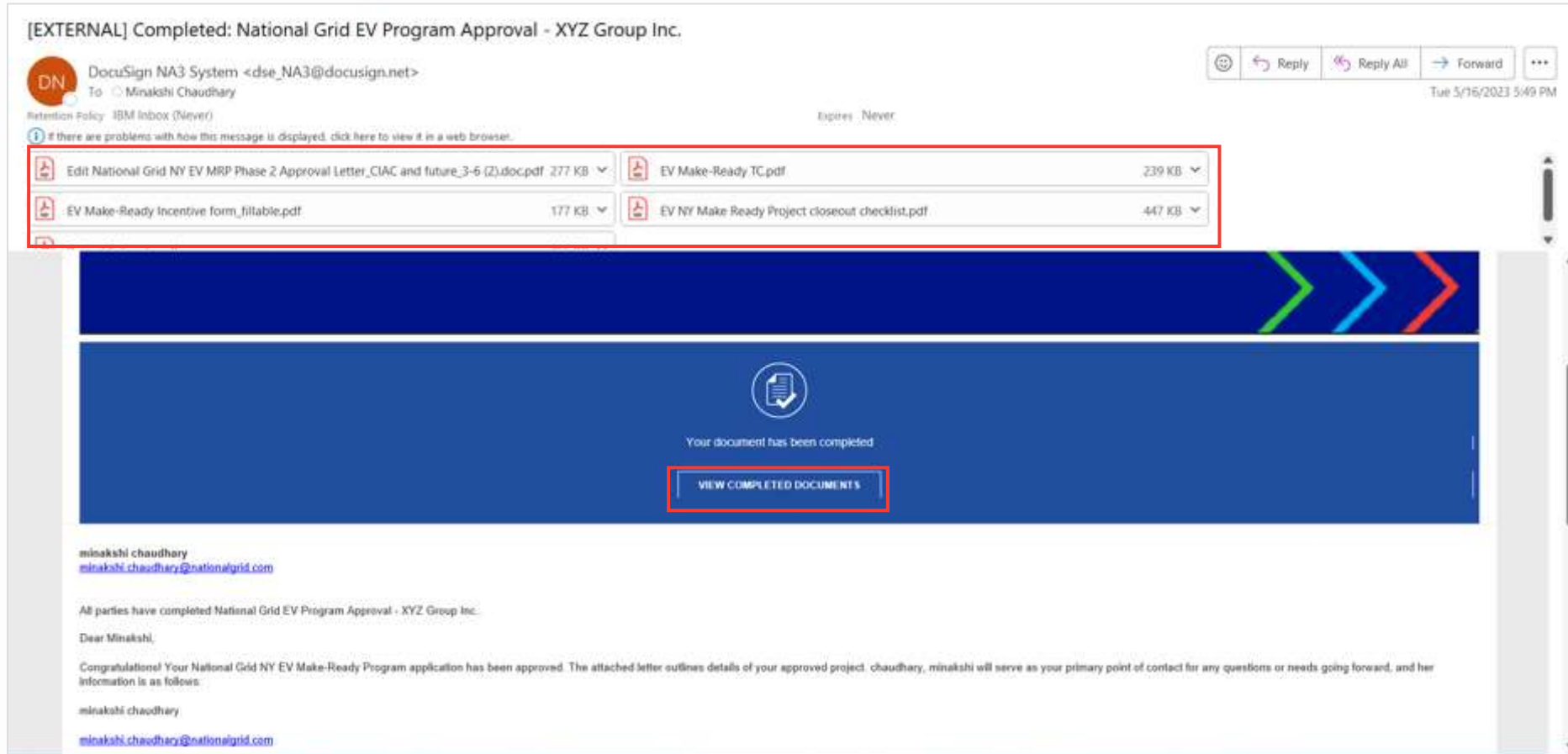
A message will appear indicating that the user has finished signing. Users can now close the browser window to exit.



# Finish Document Signing (cont.)

## HOW TO SIGN TERMS & CONDITIONS AND DETERMINE INCENTIVE ASSIGNMENTS

The user will receive an email with a copy of all signed documents, stating that the approval is complete. They can either download the documents from the email or use the **VIEW COMPLETED DOCUMENTS** button.



[EXTERNAL] Completed: National Grid EV Program Approval - XYZ Group Inc.

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.

Edit National Grid NY EV MRP Phase 2 Approval Letter_CIAC and future_3-6 (2).doc.pdf	277 KB	EV Make-Ready TC.pdf	239 KB
EV Make-Ready Incentive form_fillable.pdf	177 KB	EV NY Make Ready Project closeout checklist.pdf	447 KB

Your document has been completed

[VIEW COMPLETED DOCUMENTS](#)

minakshi.chaudhary@nationalgrid.com

All parties have completed National Grid EV Program Approval - XYZ Group Inc.

Dear Minakshi,

Congratulations! Your National Grid NY EV Make-Ready Program application has been approved. The attached letter outlines details of your approved project. Minakshi Chaudhary will serve as your primary point of contact for any questions or needs going forward, and her information is as follows:

minakshi.chaudhary@nationalgrid.com

End of Procedure