

How to Upload Missing Documents in an EV Application

EV Make-Ready – New York

November 28, 2023



How to Upload Missing Documents in an EV Application - NY



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 - NY

At times, additional documents (such as Project Quote Form, Paid Invoice, Project Photos, 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 National Grid Clean Energy Portal.

Sandbox: Documents Required for EV Application CE-0000000422 for ABC Charging NY

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

Tue 5/16/2023 12:48 PM

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-0000000422
Account: ABC Charging NY
Site Address: 18 Market st, NY, NY, 20011

[Link to Portal](#)

Best Regards

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

1 Click **Link to Portal**.

View Missing Documents Checklist

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - NY

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

i The EV applications that require the user to upload missing documents will be marked as **“Documents Needed”**.

The screenshot shows the National Grid Clean Energy Portal interface. At the top, there is a navigation bar with 'Home', 'EV Home Page', and 'Application'. Below this is a large banner with the text 'Welcome CE!' and 'Take advantage of programs and incentives to help support...'. A table of applications is displayed below the banner. The table has columns for application ID, name, status, and action. The application CE-0000000422 is highlighted with a red box, and its 'Review' button is also highlighted with a red box. A red arrow points from the 'Review' button to a callout box. The callout box contains the text: '2 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-0000000422**.' Another callout box with an information icon 'i' points to the 'Documents Needed' status of the application CE-0000000422. The table also shows other applications: CE-0000000360 (Nationalgrid NY, Documents Needed), CE-0000000407 (ABC Charging NY, Documents Needed), and CE-0000000438 (ABC Charging NY, Draft). To the right of the table, there is a section for 'New EV Application Image' with the title 'EV Charging Station Make-Ready Program' and a 'Start Application' button. Below this is a 'Resources' section with links for 'Electric Vehicle Hub', 'Program Brochure', and 'Application Requirements'.

| Application ID | Application Name | Status | Action |
|----------------|------------------|------------------|----------|
| CE-0000000360 | Nationalgrid NY | Documents Needed | Review |
| CE-0000000407 | ABC Charging NY | Documents Needed | Review |
| CE-0000000422 | ABC Charging NY | Documents Needed | Review |
| CE-0000000438 | ABC Charging NY | Draft | Continue |

View Missing Documents Checklist (cont.)

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - NY

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

The screenshot shows the National Grid EV UAT Partner portal. The page title is "Missing Documents Checklist". The application details are as follows:

- Application Number: CE-0000000422
- Account Name: ABC Charging NY
- Site Address: 18 Market st, NY, NY, 20011
- Jurisdiction: ,
- Charger Type: DCFC
- Status: PM Review Completed

Below the application details, there are two missing document sections:

- Project Quote Form**: Includes an "Upload Files" button and the text "Or drop files".
- Paid Invoice**: Includes an "Upload Files" button and the text "Or drop files".

At the bottom of the page, there are "Cancel" and "Next" buttons.

Document Guidance

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - NY

Missing Documents Checklist

Application Details

Application Number: CE-0000000422
Account Name: ABC Charging NY
Site Address: 18 Market st, NY, NY, 20011
Jurisdiction: ,
Charger Type: DCFC
Status: PM Review Completed

*** Project Quote Form** ⓘ *** Paid Invoice** ⓘ

Upload Files Or drop files

Cancel Next

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

Must use the Project Quote Form provided by National Grid updated with final as-built costs. Values must match the Signed Customer Contract.

Document Guidance (cont.)

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - NY

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

| Document | Description |
|---------------------------------|---|
| Project Quote Form | <ul style="list-style-type: none">• Must use the Project Quote Form provided by National Grid updated with final as-built costs• Values must match the Signed Customer Contract |
| Signed Customer Contract | <ul style="list-style-type: none">• A copy of the SIGNED contract between the approved EV installer and customer showing all project costs including the total amount the customer will pay for the EV installation |
| 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 Contract |
| EVSE Worksheet | <ul style="list-style-type: none">• Must use the EVSE Worksheet provided by National Grid |
| 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 completed |

Document Guidance (cont.)

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - NY

| Document | Description |
|---|---|
| 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 station• Activation email from the network• Activation on PlugShare or another station-finding app |
| W9 - Approved Contractor (Trade Partner) | <ul style="list-style-type: none">• A copy of the W9 for the entity receiving the incentive payment (customer or payee or both if the payee is receiving the incentive) |
| Assignment of Incentive Form | <ul style="list-style-type: none">• If applicable, the Assignment of Incentive Form must be signed by the customer |
| As Built Drawings | <ul style="list-style-type: none">• Both drawings must be provided in PDF format:<ul style="list-style-type: none">• Single Line Electrical Schematic• Installed Dimensioned Site Plan |
| 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 payment• TO: National Grid• Amount: The approved EV MRP Incentive Amount• The EV number (EV-00000)• Values on the Invoice must match the Project Quote Form |

Upload Missing Documents

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - NY

Missing Documents Checklist

Application Details

Application Number: CE-0000000422
Account Name: ABC Charging NY
Site Address: 18 Market st, NY, NY, 20011
Jurisdiction: ,
Charger Type: DCFC
Status: PM Review Completed

*Project Quote Form ⓘ

Or drop files

*Paid Invoice ⓘ

Or drop files

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

Upload Missing Documents (cont.)

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - NY

Missing Documents Checklist

Application Details

Application Number: CE-0000000422
Account Name: ABC Charging NY
Site Address: 18 Market st, NY, NY, 20011
Jurisdiction: ,
Charger Type: DCFC
Status: PM Review Completed

* Project Quote Form ⓘ

* Paid Invoice ⓘ

Upload Files Or drop files

Upload Files Or drop files

Project Quote ABC Charging.pdf

Paid Invoice ABC Charging.pdf

Cancel

Next

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

Files Received Message

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - NY

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

The screenshot displays the National Grid Clean Energy Portal interface. At the top left is the 'nationalgrid' logo. At the top right, there are two circular icons with text: 'NG EV UAT Partner ...' and 'EV CE UAT Partner ...'. Below the logo is a dark blue navigation bar with three links: 'Home', 'EV Home Page', and 'Application'. The main content area features a white box with a red border containing the following text:

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

At the bottom of the page, there are three buttons: 'Cancel', 'Previous', and 'Next'. The 'Next' button is highlighted with a red box. A callout box with a red circle containing the number '6' and the text 'Click **Next** to continue.' has a red line pointing to the 'Next' button.

View Application Details

HOW TO UPLOAD MISSING DOCUMENTS IN AN EV APPLICATION - NY

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

| Application Number | Legacy Application Number | Customer Name | Billing Account Number | City, State | Charger Type | Incentive Amount | Status |
|---|---------------------------|-----------------|------------------------|---------------|--------------|------------------|----------------------|
| <div style="display: flex; justify-content: space-between;"> Home EV Home Page Application </div> <div style="margin-top: 10px;"> <input type="text" value="Search"/> </div> | | | | | | | |
| <div style="display: flex; justify-content: space-between;"> ▼ In Progress </div> | | | | | | | |
| CE-0000003214 | | ABC Chargers | 5800064461 | WATERTOWN, NY | Level 2 | | Submitted |
| CE-0000003213 | | ABC Chargers | 5800064461 | | | | Submitted |
| CE-0000003212 | | ABC Chargers | 5800064461 | | | | Instruction Complete |
| CE-0000003112 | | ABC Chargers | 5800064461 | | | | PM Review Completed |
| CE-0000001391 | EV-178670 | NY Chargers INC | XYZ EVs NY | VB, NY | Level 2 | \$28,300.00 | PM Review Completed |
| CE-0000001346 | EV-178669 | NY Chargers INC | XYZ EVs NY | VB, NY | DCFC | \$18,000.00 | Processing Payment |
| CE-0000000863 | EV-178037 | NY Chargers INC | EV chargers NY | NY, NY | DCFC | \$43,000.00 | PM Review |
| CE-0000000422 | | ABC Charging NY | 1234567899 | NY, NY | DCFC | | PM Review Completed |
| CE-0000000353 | | NY Chargers INC | XYZ EVs NY | VB, NY | Level 2 | | PM Review |
| CE-0000000345 | | NY Chargers INC | XYZ EVs NY | VB, NY | Level 2 | | Submitted |

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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 - NY

The uploaded files will be visible in the application record.

Home EV Home Page Application

Clean Energy Application CE-0000000422

| Billing Account Number | Program Name | Application Type | Jurisdiction | Incentive Amount |
|------------------------|----------------------------------|------------------|--------------|------------------|
| 1234567899 | EV Make-Ready Program - New York | Complex | New York | |

> [✓] [✓] [✓] PM Revi... Applicati... Applicati... Under C... Construc... Close Ou... Processi... < >

| | |
|---|-----------------------------------|
| Created By NG EV UAT Partner Contact | Submitted Date 05/26/2023 |
| Customer Name ABC Charging NY | Legacy Application Number |
| Billing Account Number 1234567899 | Service Address Zip Code 20011 |

Files (3+)

- Paid Invoice ABC Charging
Jun 2, 2023 • 25KB • pdf
- Project Quote ABC Charging
Jun 2, 2023 • 25KB • pdf

End of Procedure