

Portal Guide

NYSEG/RG&E EV Make-Ready
July 2021

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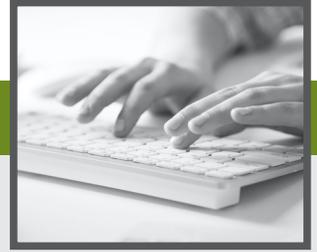
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EV Make-Ready Portal Guide

This document will take you step-by-step through the application process in the portal.



First-Time Users

First-time users of the Portal will be requested to register as a Customer Representative. Please click on the link below and choose "Customer/Representative." Accounts are reviewed for approval each business day. You will receive an email from the system when your account is ready to "use."

<https://tradeally-efficiencynavigator.azurewebsites.net/Account/Register>

Log in/Register

NGAGE
PARTNER

Register

Fill out your account information below.

User Information

Account Type * Trade Ally Customer/Representative Program Staff

Email *

First name *

Last name *

Password *

Confirm password *

Security question

Answer *

Register

Returning Visitors

If you are a returning visitor, log in with your email and password using this link:

<https://tradeally-efficiencynavigator.azurewebsites.net/Account/Login>

NYSEG RG&E
Part of the AVANGRID Family

Notifications (0)

Log In

Email

Password

Remember me?

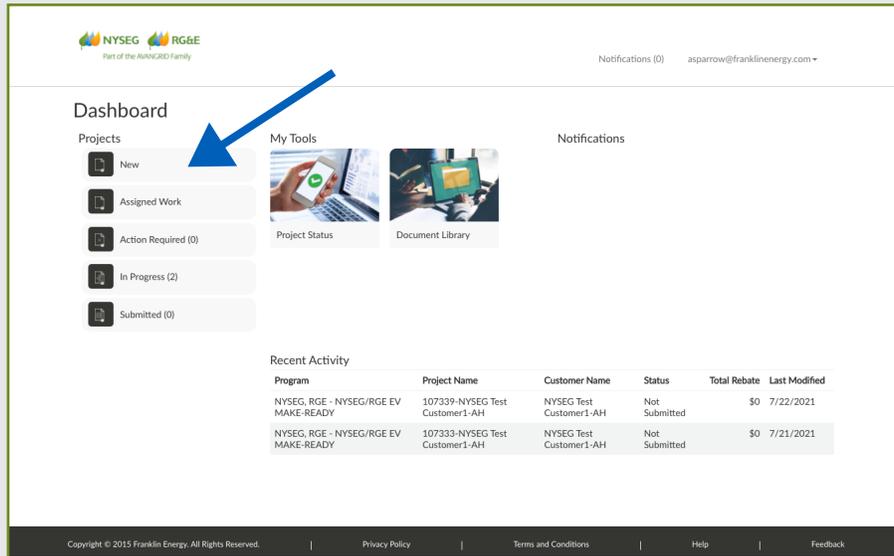
Log in

Register as a new user

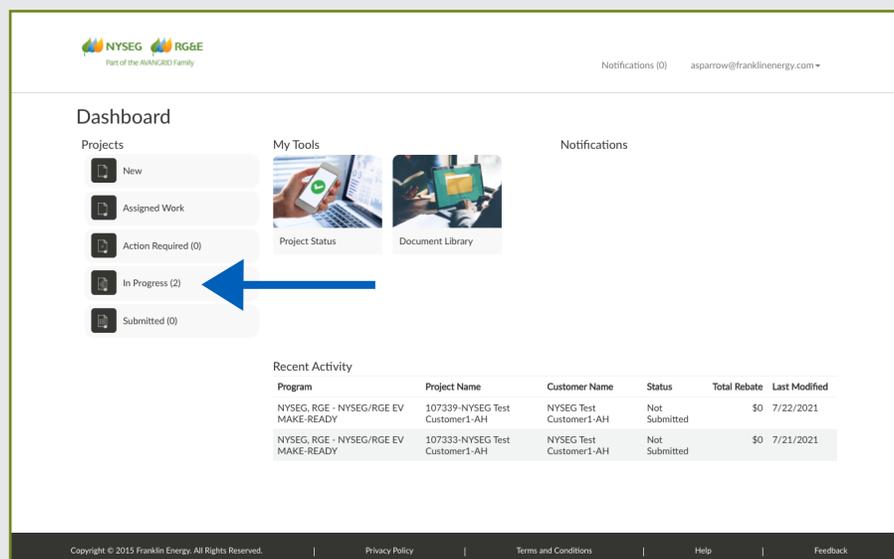
Applications

Once logged in, you'll be able to:

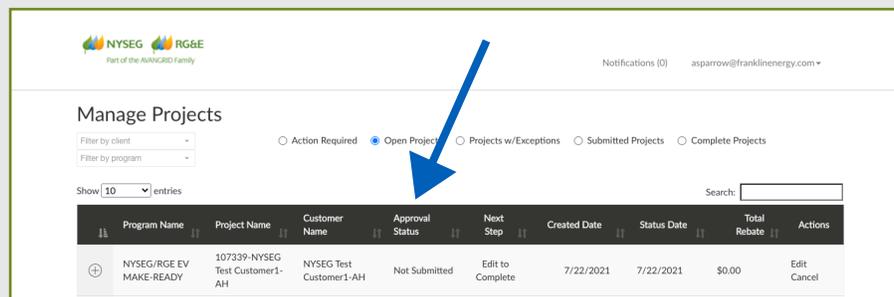
1. Start a new application.



2. Review an application already in progress.

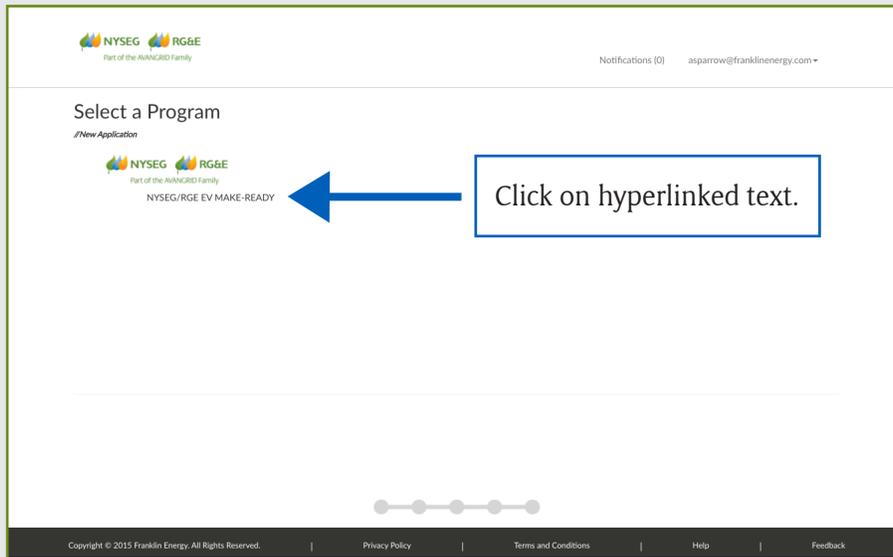


3. See the current status of an application under the "In Progress" tab.

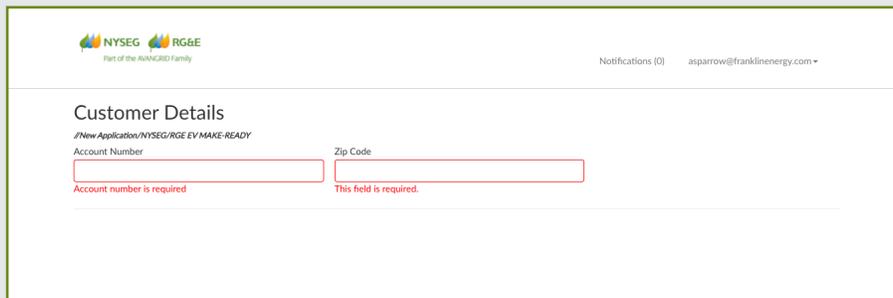


Account Approval

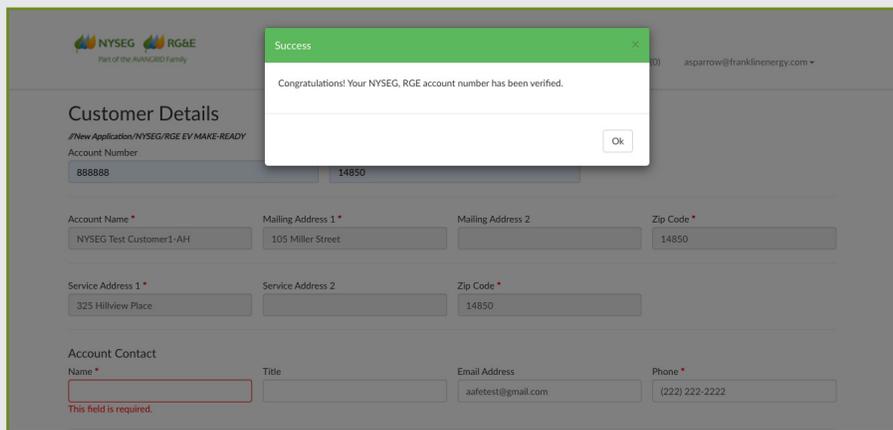
When your account is approved, you will be provided access to the NYSEG/RGE EV-Make Ready program. Click on the link to start a new application.



Enter both the customer account number and ZIP code for the project, then click on “Validate Account Number.” Please enter the account number without dashes. If an account number is not yet assigned or there is a problem validating the account, please contact the EV Make-Ready Program team.



When the account has been validated, click “OK” on the Success notification to close the notification. Note that some of the account information will already be filled in on the form.



Finding Available Rebates

Complete as much of the missing information as you are able to. Required fields are highlighted in red. Click “Save and Continue” when you have finished with this section. This will bring up the “Available Rebates” screen.

Customer Details
/Existing Application/NYSEG/RGE EV MAKE-READY/NYSEG Test Customer1-AH/107340-NYSEG Test Customer1-AH

Account Number: 888888 | Zip Code: 14850

Account Name: NYSEG Test Customer1-AH | Mailing Address 1: 105 Miller Street | Mailing Address 2: | Zip Code: 14850

Service Address 1: 325 Hillview Place | Service Address 2: | Zip Code: 14850

Account Contact
Name: (This field is required.) | Title: | Email Address: aafetest@gmail.com | Phone: (222) 222-2222

[Save & Continue](#)

On the “Available Rebates” screen, multiple charging station options are offered. You may choose either the DCFC or Level 2 option. Group multiple chargers into one entry if their equipment configurations are identical. Submit separate entries for each unique equipment configuration.

Available Rebates
/Existing Application/NYSEG/RGE EV MAKE-READY/NYSEG Test Customer1-AH/107340-NYSEG Test Customer1-AH

← Customer Details

Search by Keyword:

Filter By: All | Process

All Rebates (2)

- DCFC Charging Station
- Level 2 Charging Station

107340-NYSEG Test Customer1-AH

[View Exceptions](#) [Continue](#)

Applying for a Charging Station



Once you click on your desired choice from the “Available Rebates” page, the necessary fields for application completion will be displayed. The required information regarding the equipment/charging station are highlighted in red. Complete this section, then choose “Add to Project.” If there is any missing information, a screen will pop up asking you to complete the missing field.

After choosing “Add to Project,” you will be returned to the “Available Rebates” screen where you can add another station if applicable or choose to “Continue.” You may add as many stations as you need for your project.

Once you hit “Continue,” you will see the “Project Details” screen, which is divided into six sections:

1. Project/Site Description
2. Electric Service Requirements
3. Project Cost Details
4. Site Owner/Developer Information
5. Participant Information
6. Installer Information & Payee Assignment

Project Details - Further Instructions

Complete all fields if possible; required fields are highlighted in red.

The "Primary Installer" section includes a list of approved contractors. This list is updated weekly.

Project Details - Payee Assignment

The following choices are possible options for who can be designated as the payee assignment:

- Utility Customer
- Primary Installer
- Third Party Participant, which may include:
 - **Developer:** An entity responsible for designing, constructing, and commissioning an EV charger site. This entity may also be responsible for owning, managing, and operating the chargers.
 - **Equipment Owner:** The entity that purchases and owns the EV charging equipment once it is installed.
 - **Site Host:** The owner of the site on which the EV charging equipment is installed. The site host may or may not be the equipment owner

PLEASE NOTE: Choosing "Primary Installer" or "Utility Customer" for the recipient of the rebate will result in the fields being filled in according to the information saved in the system. Choosing "Third Party Participant" requires additional information to be added. When finished, click "Save."

PLEASE NOTE: Your answers in certain fields may require additional information. The required additional information will be displayed in the "Exceptions" screen, which may pop up once you click "Save." Choose "Fix Exceptions" to respond.

Required Documents

Before uploading any documents, please read and follow the guidelines for required documents. The four required documents are noted under “Additional Documents Required.” Only one document can be uploaded at a time. Choose the document you wish to upload by checking the correct box and uploading it. Then, choose the next document by checking the appropriate box and uploading it. Continue until all required and any extra documents you wish to include have been uploaded.

The screenshot shows the 'Upload Documents' section of the application portal. At the top, there are logos for NYSEG and RG&E, and a user profile for 'asparrow@franklinenergy.com'. The main heading is 'Upload Documents'. Below it, there are 'Document Requirements' and a list of criteria for quotes or invoices. A 'Select All' button is visible. Under 'Additional Documents Required', there are several checkboxes for uploading quotes, site plans, satellite images, and specification sheets. At the bottom, there are 'Back', 'View Exceptions', and 'Review Application' buttons.

Project Review & Submission

When all required information has been provided, click the “Review Application” button. If there is any missing information, a screen will appear listing the missing information in red. If there is not any information missing, you will be directed to the “Project Summary Review” screen. Here you can review all the information that has been entered. You will be asked to indicate that you have read the Terms and Conditions, as well as to Certify and Submit the Application.

The screenshot shows the 'Project Summary Review' page. It displays the project name '107340-NYSEG Test Customer1-AH' and a red message stating 'The project has not been submitted. Scroll down this page to review and submit the project.' Below this, there are sections for 'Account Information', 'Utility Information', 'Installer Information', and 'Payee Information', each containing contact details and addresses. At the bottom, there is an 'Additional Information' section with a note to 'Please limit responses to 255'. Navigation buttons for 'Back', 'View Exceptions', and 'Review Application' are present.

Prior to clicking “Submit Rebate Application,” please read and check the boxes for “Terms and Conditions” and “Certification.” Then click “Submit Rebate Application.”

The screenshot shows the 'Terms and Conditions' and 'Certify and Submit Application' page. It features a large text area for reviewing terms and conditions, followed by two checkboxes for agreement. Below this is the 'Certify and Submit Application' section with another checkbox. At the bottom, there are 'Back', 'Submit Rebate Application', and 'Cancel' buttons. A footer contains copyright information and links for Privacy Policy, Terms and Conditions, Help, and Feedback.

Your successful submission of the application will be indicated. This may take a few moments.

Success

Your project has been submitted successfully. The Project ID for your submission is 72027.

OK

Project Summary Review


HYSEG | RC&E
Part of the Franklin Energy Group

Application Receipt

Project:
Approval Number/Submission Id: 72027
Customer Name:
Address:
Submitted:

Rebates	Total Rebate
Level 2 Charging Station	
Application Total	\$0

Save to PDF Print

Frequently Asked Questions



- Q.** I don't have all the information I need to complete the application. May I come back to finish later?
- A.** Yes, as described in the guide, you may update an incomplete application at any time by logging back in and picking up where you exited previously.
- Q.** I have submitted my application. How long will it take for me to receive approval and an expected rebate amount?
- A.** Approval turnaround is generally quick and can often be completed within two weeks from receipt of a complete application package. Projects requiring new or upgraded service will take longer as Contribution In Aid of Construction (CIAC) costs will need to be determined in order to provide an accurate rebate amount. Time frames will vary depending on the size and complexity of the project.
- Q.** I uploaded the wrong document; how do I remove it?
- A.** Simply choose the document and click "delete."
- Q.** I am having trouble uploading my documents. Can I upload them all at once?
- A.** No. Please upload one at a time, indicating in the check box which you are uploading, until all required documents are complete.
- Q.** How can I be listed as an Approved Contractor?
- A.** You must first be approved by the Joint Utilities of New York. Follow this link to see a list of approved contractors: https://jointutilitiesofny.org/node/add/approved_contractors
- Q.** I have questions not listed here. Is there someone I can speak to for assistance with the portal?
- A.** Yes, our program team is available to assist with all of your questions. Call 844.823.6400 or email us at evmr@franklinenergy.com.