



NYSEG/RG&E EV Make-Ready July 2021

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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			
PARINER			
Register			
Fill out your account information	below.		
User Information			
Account Type *	Trade Ally Customer/Representative Program Staff		
Frasil •		m	
Eman			
First name *			
Last name *			
Password *		P	
Confirm password *		P	
Security question	What was the name of your first pet?	·	
Answer *		0	
	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

Part of the AVANG	RG&E RID Family			Notifications (0)
Log In				
Email				
Password				
	Remember me? Log in Register as a new user	Forgot your password		



Once logged in, you'll be able to:

1. Start a new application.

Purt of the ANANCERD Family				Notificat	ions (0) as	parrow@franklin	energy.com v	
Dashboard								
Projects	My Tools			Notifications				
New								
Assigned Work		18						
Action Required (0)	Project Status	Docu	ment Library					
In Progress (2)								
Submitted (0)								
	Recent Activity							
	Program		Project Name	Customer Name	Status	Total Rebate	Last Modified	
	NYSEG, RGE - NYSEG/RGE MAKE-READY	EV	107339-NYSEG Test Customer1-AH	NYSEG Test Customer1-AH	Not Submitted	\$0	7/22/2021	
	NYSEG, RGE - NYSEG/RGE MAKE-READY	EV	107333-NYSEG Test Customer1-AH	NYSEG Test Customer1-AH	Not Submitted	\$0	7/21/2021	
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2. Review an application already in progress.

WYSEG WIRGEE Put of the ANANCRO Family			Notificati	ons (0) a	sparrow@franklin	energy.com v	
Dashboard							
Projects	My Tools		Notifications				
New							
Assigned Work							
Action Required (0)	Project Status D	ocument Library					
In Progress (2)							
Submitted (0)							
	Recent Activity						
	Program	Project Name	Customer Name	Status	Total Rebate	Last Modified	
	NYSEG, RGE - NYSEG/RGE EV MAKE-READY	107339-NYSEG Test Customer1-AH	NYSEG Test Customer1-AH	Not Submitted	\$0	7/22/2021	
	NYSEG, RGE - NYSEG/RGE EV MAKE-READY	107333-NYSEG Test Customer1-AH	NYSEG Test Customer1-AH	Not Submitted	\$0	7/21/2021	
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3. See the current status of an application under the "In Progress" tab.

dia N Pa	IYSEG did RG&E				/	Notifi	cations (0) asp	parrow@franklinen	ergy.com v
Man Filter by c Filter by p Show 10	age Project	orts	Action Required 🧕) Open Project	Projects w/Exce	ptions 🔿 Submittee	l Projects 🛛 Co	mplete Projects Search:	
11	Program Name	Project Name	Customer Name	Approval Status	Next Step ⊥†	Created Date	Status Date	Total Rebate	Actions
\oplus	NYSEG/RGE EV MAKE-READY	107339-NYSEG Test Customer1- AH	NYSEG Test Customer1-AH	Not Submitted	Edit to Complete	7/22/2021	7/22/2021	\$0.00	Edit Cancel

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.

HYSEG RG&E Part of the ANAVGRO Family				Notifications (0)	asparrow@franklin	energy.com v	
Select a Program							
WINYEE WIR REGE Part of the RANACRO Family NYSEG/RGE EV MAKE-READY	-		Click or	n hyperl	inked te	ext.	
Copyright © 2015 Franklin Energy, All Rights Reserved.	1	Privacy Policy	Terms and Condition	15 I	Help	Fee	dback

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.

Part of the ANANGRO Family		Notifications (0) asparrow@franklinenergy.com -
Customer Details		
//New Application/NYSEG/RGE EV MAKE-READY		
Account Number	Zip Code	
Account number is required	This field is required.	

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.

NYSEG MIRGEE	Success		X
	Congratulations! Your NYSEC	, RGE account number has been verified.	(o) asharrowstrankmener®/com.
Customer Details //New Application/NYSEG/RGE EV MAKE-READY Account Number			Ск
888888	14850		_
Account Name *	Mailing Address 1 *	Mailing Address 2	Zip Code *
NYSEG Test Customer1-AH	105 Miller Street		14850
Service Address 1 *	Service Address 2	Zip Code *	
325 Hillview Place		14850	
Account Contact			
Name *	Title	Email Address	Phone *
		aafetest@gmail.com	(222) 222-2222

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.

Vaccount Number Zip Code 88888 14850 Account Name* Mailing Address 1* NYSEG Test Customer1-AH 105 Miller Street iervice Address 1* Service Address 2 225 Filinkerw Place Zip Code* Account Contact 14850 Aame* Title Email Address Phone* is field is required. 105 Phone*	//Existing Application/NYSEG/RGE EV MAR	E-READY/NYSEG Test Customer1-AH/107340-NY	SEG Test Customer1-AH	
BBBBBB 14850 Account Name* Mailing Address 1* NYSEG Test Customer1-AH 105 Miller Street iervice Address 2 Zip Code* 325 Hillwiew Place 14850 Account Contact tame* Title Email Address Phone* iaafetest@gmail.com (222) 222-2222	Account Number	Zip Code		
Account Name* Mailing Address 1* Mailing Address 2 Zip Code* NYSEG Test Customer1-AH 105 Miller Street 14850 service Address 1* Service Address 2 Zip Code* 325 Hillwew Pace 14850	888888	14850		
NYSEG Test Customer1-AH 105 Miller Street 14850 iervice Address 1 * Service Address 2 Zip Code * 325 Hillwew Place 14850	Account Name *	Mailing Address 1 •	Mailing Address 2	Zip Code •
Service Address 2 Zip Code* 325 Hillview Place 14850 Account Contact Jame * Title Email Address Phone * asfetest@gmail.com (222) 222-2222	NYSEG Test Customer1-AH	105 Miller Street		14850
325 Hillwiew Place 14850 Account Contact tame* Title Email Address Phone* aafetest@gmail.com (222) 222-2222 This field is required.	Service Address 1 *	Service Address 2	Zip Code *	
Account Contact Name * Title Email Address Phone * aafetest@gmail.com (22) 222-2222 This field is required.	325 Hillview Place		14850	
Name* Title Email Address Phone* Title affects@gmail.com (222) 222-2222 This field is required.	Account Contact			
aafetest@gmail.com (222) 222-2222	Name *	Title	Email Address	Phone *
This field is required.			aafetest@gmail.com	(222) 222-2222
	This field is required.			

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.

RGE Part of the AMANGRO Family	E			Noti	fications (0)	asparrow@frankline	energy.com v	
Available Reba //Existing Application/VVSEG/RGE ← Customer Details	ates ev make-ready/nyseg	Test Customer1-AH/107340-NYSEG Te	st Customer1-AH	407		the Contract All		
Search for Q Filter By ZAII Process	All Rebates (2)	Level 2 Charging Station		Vic	w Exceptions	st Customeri-An	Continue →	
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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.

RG&E	E			Notifications (0)	asparrow@franklinenergy.com ~
Available Reba //Existing Application/NVSEG/RGE ← Customer Details	ates ev make-ready/nyseg	Test Customer1-AH/107340-NYSEG Test Custor	mer1-AH		
Search by Keyword:	All Rebates (2)			107340-NYSEG	Test Customer1-AH
Search for Q Filter By All Process	DCFC Charging Station	Level 2 Charging Station		View Exceptions	Continue 🔿

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

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

WYSEG. die RChE Rutof die Andrezio Lanky	Notifications (0) asparrow@franklinenergy.com •
Project Details /Exercise Application/VYSEG/REELEVANCE/ERD/VYSEG/Test Customert-MU107340-VYSEG/Test Customert-MU10740-VYSEG/Test Customert-M	toner-M
Please limit responses to 255 characters or less Would you also like to apply for the DCFC Per-Plug Incentive Program? * Select an option	I am only interested in EV supply equipment electrical service and am not applying for incentives under the DC Fast Charger Per-Plug Incentive Program and/or the Make-Ready Incentive Program *
An option is required	Select an option
Address of L2 of DLFC station if different than customer site address	rype or racinty · Select an option v
Other facility type	Total number of charging stations for this project *
Total number of plugs for this project *	This field is required. Are chargers intended or available for public use? •
This field is required.	An option is required

Project Details - Payee Assignment

Abbott Energy, Inc.: Abbott Energ	y, Inc.		*
Who do you wish to receive the reba	ate?		
O Primary Installer	 Utility Customer Customer1-AH 	- NYSEG Test	OThird Party Participant (if different than Utility Customer)
Payee Name		Contact Name	
NYSEG Test Customer1-AH			
		This field is requi	ired.
Mailing Address 1		Contact Title	
105 Miller Street			
Mailing Address 2		Contact Email	
		aafetest@gmai	l.com
City/State		Contact Phone	
Ithaca, NY		(222) 222-222	2
Zip Code			
14850			

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."

er ti	e Program Participant? Particip	pant Name - if different from Customer
1	Exceptions for: 107340-NYSEG Test Customer1-AH	×
	Would you also like to apply for the DCFC Per-Plug Incentive Pr required	rogram? is Invalid
	I am only interested in EV supply equipment electrical service an applying for incentives under the DC Fast Charger Per-Plug Ince and/or the Make-Ready Incentive Program is required	nd am not Invalid entive Program
	Type of facility is required	Invalid
4FI	Total number of charging stations for this project is required	Invalid
	Total number of plugs for this project is required	Invalid
y in	Are chargers intended or available for public use? is required	Invalid
2.28	Is proposed site located in a Disadvantaged Community is requir	red Invalid
	Are chargers networked? is required	Invalid
rec	Demand management software or hardware? is required	Invalid
	Will EV supply equipment be bi-directional? is required	Invalid
	Any co-located distribution generation or energy storage? is req	uired Invalid
me	Have you previously requested a new service or service upgrade location? is required	e for this Invalid
I	Are you requesting as part of this application a new service for t required	this location? is Invalid
l	Are you requesting as part of this application a service upgrade location? is required	for this Invalid
	Will futureproofing work be performed at this site? is required	Invalid
	Total customer side electrical infrastructure cost is required	Invalid
	Total project make ready cost excluding futureproofing and char equipment is required	rging Invalid
	Estimated Completion Date is required	Invalid
	Is the Utility Customer the Site Owner/Developer? is required	Invalid
	Is the Utility Customer the Program Participant? is required	Invalid
		Fix Exceptions Continue
n En	rsgy: All Rights Reserved. Privacy Policy	Terms and Conditions Help

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

Who was the primary installer?		
_Other: _TA not found_		<u> </u>
Select a Contractor	Party Participant (if diffe	
		ty Customer)
Abbott Energy, Inc.: Abbott Energy, Inc.		
Absolute Electrical Contracting: Absolute Electrical		
AE Rosen Electrical Co Inc: AE Rosen Electri		
Aetna Corp.: Aetna Corp.		
Mailing Address 2	Contact Email	
City/State	Contact Phone	

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: 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.



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.

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Project Summar	y Review			
Project: 107340-N	SEG Test Customer1-AH			
,	** The project has not been submitted. S	croll down this page to review and submit th	e project. **	
View Exceptions				
Associat Information		I Milita Information		
Account Monation	NYSEG Test Customer1-AH	Utility Information	NYSEG RGE	
Account Contact:		Program:	NYSEG/RGE EV MAKE-READY	
Contact Phone:	(222) 222-2222	Electric Account Number:	888888	
Contact Email:	aafetest@gmail.com	Gas Account Number:	888888	
Primary Address:	105 Miller Street Ithaca, NY 14850			
Site Address:	325 Hillview Place Ithaca, NY 14850			
Installer Information		Payee Information		
Company:	Abbott Energy, Inc.	Business Name:	NYSEG Test Customer1-AH	
Contact:	Daniel Farrow	Street Address:	105 Miller Street	
Phone:			Ithaca, NY 14850	
Email:	dfarrow@abbottenergy.com			
Address:	1425 Central Avenue Unit 5905 Albany, NY 12205			
Additional Information				
Please limit responses	to 255			

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

I have reviewed the above responses for completene	ess and accura	ICV.						
 I have read and agree with all the terms and condition 	ions set forth	in the Terms and Con	ditions documer	t.•				0
Certify and Submit Applic	ation							
 I hereby certify that the information contained in the 	his application	is complete and that	I agree to all the	terms and conditions set	forth in this appli	cation. •		
+ Back		Submit	Rebate Applicati	n			Cance	4
	1			-				

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



Project Summary Review	
ALL NYSEG ALL NGGE	
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



- **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.
- **O.** 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.
- **O.** 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: <u>https://jointutilitiesofny.org/node/add/approved_contractors</u>
- **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.