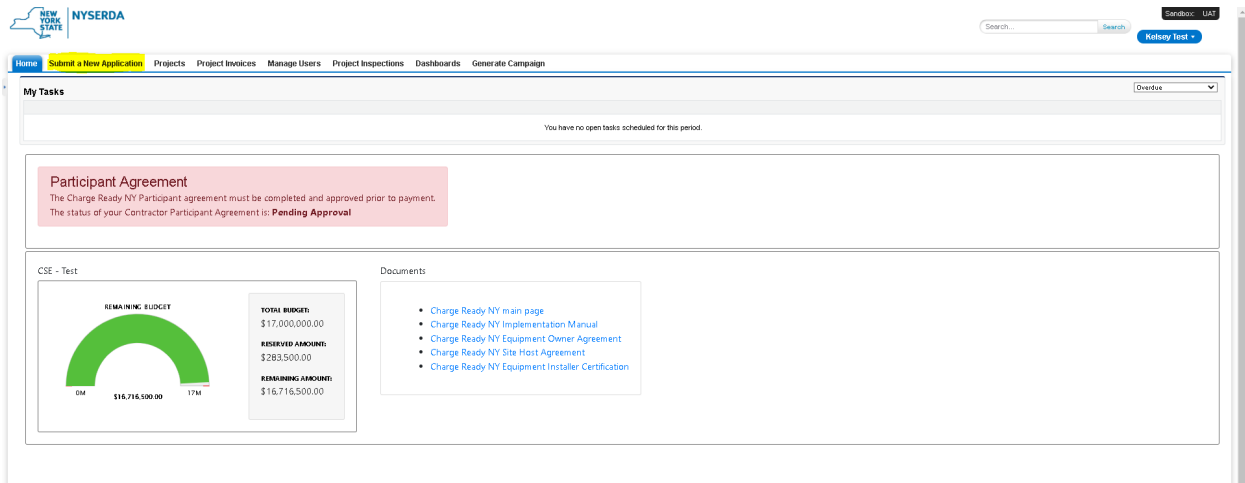


# Steps to Complete a Charge Ready Application (Pre-approval & Post Installation)

1. Contractors will login to the NYSERDA portal and then navigate to the “Submit a New Application” tab.



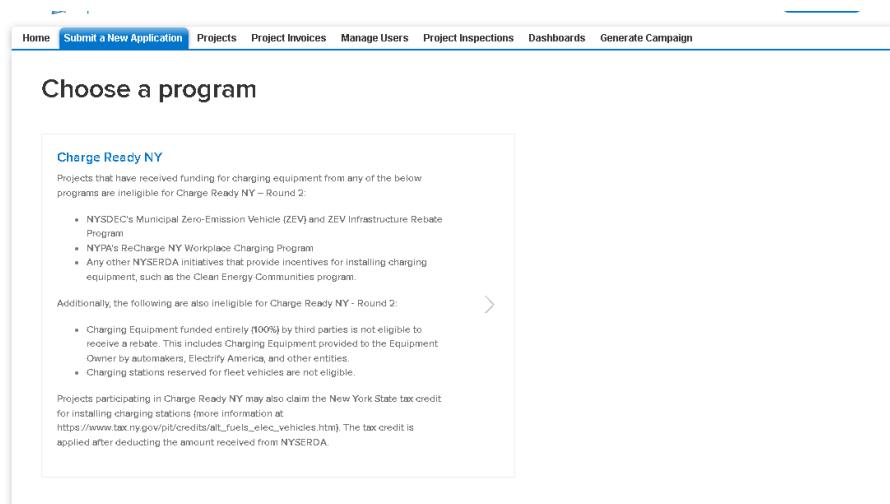
The screenshot shows the NYSERDA portal dashboard. At the top, there is a navigation bar with the NYSERDA logo and a search bar. Below the navigation bar, there is a 'My Tasks' section with a dropdown menu. The main content area features a 'Participant Agreement' section with a red background and the text: 'The Charge Ready NY Participant agreement must be completed and approved prior to payment. The status of your Contractor Participant Agreement is: **Pending Approval**'. Below this, there is a 'CSE - Test' section with a green gauge chart showing 'REMAINING BUDGET' at \$16,716,500.00. To the right of the gauge, there is a table with budget information:

<b>TOTAL BUDGET:</b>	\$17,000,000.00
<b>RESERVED AMOUNT:</b>	\$283,500.00
<b>REMAINING AMOUNT:</b>	\$16,716,500.00

Below the budget information, there is a 'Documents' section with a list of links:

- [Charge Ready NY main page](#)
- [Charge Ready NY Implementation Manual](#)
- [Charge Ready NY Equipment Owner Agreement](#)
- [Charge Ready NY Site Host Agreement](#)
- [Charge Ready NY Equipment Installer Certification](#)

2. They will then be asked to select the Charge Ready NY as the program they want to apply for.



The screenshot shows the 'Choose a program' page in the NYSERDA portal. The page title is 'Choose a program'. Below the title, there is a section for 'Charge Ready NY' with the following text: 'Projects that have received funding for charging equipment from any of the below programs are ineligible for Charge Ready NY - Round 2:'

- NYSDEC's Municipal Zero-Emission Vehicle (ZEV) and ZEV Infrastructure Rebate Program
- NYP&S ReCharge NY Workplace Charging Program
- Any other NYSERDA initiatives that provide incentives for installing charging equipment, such as the Clean Energy Communities program.

Additionally, the following are also ineligible for Charge Ready NY - Round 2:

- Charging Equipment funded entirely (100%) by third parties is not eligible to receive a rebate. This includes Charging Equipment provided to the Equipment Owner by automakers, Electrify America, and other entities.
- Charging stations reserved for fleet vehicles are not eligible.

Projects participating in Charge Ready NY may also claim the New York State tax credit for installing charging stations (more information at [https://www.tax.ny.gov/pit/credits/alt\\_fuels\\_elec\\_vehicles.htm](https://www.tax.ny.gov/pit/credits/alt_fuels_elec_vehicles.htm)). The tax credit is applied after deducting the amount received from NYSERDA.

### 3. Starting the Application – Steps 1 through 9

#### Step 1: Who is Applying?

The applicant will have 4 different options to choose from. Please see below:

- I am the equipment owner of the charging stations and the incentive will be paid to me.
- I am the equipment owner of the charging stations and the incentive will be paid to the installer.
- I am the installer of the charging stations and the incentive will be paid to me.
- I am the installer of the charging stations and the incentive will be paid to the equipment owner.

#### Charge Ready NY 2.0



Project Info (Step 1 of 9)

There are four different contact roles in this application. The "Equipment Owner" is the entity who will own the charging equipment and be responsible for providing charging data for a period of five (5) years. The "Site Owner" is the entity who owns the property where the charging equipment is installed. The Site Owner may or may not be the same entity as the Equipment Owner. The "Installer" is the entity that installs the charging equipment. The Installer may or may not be the same entity as the Equipment Owner. The "Payee" is the entity who will receive the incentive payment. The Payee may or may not be the same entity as the Equipment Owner or Installer.

#### Who is applying?

- I am the equipment owner of the charging stations and the incentive will be paid to me.
- I am the equipment owner of the charging stations and the incentive will be paid to the installer.
- I am the installer of the charging stations and the incentive will be paid to me.
- I am the installer of the charging stations and the incentive will be paid to the equipment owner.

## Step 2: Contact Information for Equipment Owner/Site Owner/Installer

There are three different contact roles for the application. This includes the Equipment Owner, Site Owner, and Installer. Some contacts will automatically populate based on what the applicant selected in Step 1 (ex: Payee contact). The applicant must add a primary contact for each role before moving forward to Step 3 or they will receive an error message.

### Charge Ready NY



#### Project Contacts (Step 2 of 9)

There are three different contact roles in this application. The 'Equipment Owner' is the entity who will own the charging equipment and will be responsible for providing charging data for a period of five (5) years. The 'Site Owner' is the entity who owns the property where the charging equipment is installed. The Site Owner may or may not be the same entity as the Equipment Owner. The 'Installer' is the entity that installs the charging equipment. The Installer may or may not be the same entity as the Equipment Owner.

[+ ADD A CONTACT](#)

Show  entries

Search:

Action	Primary?	Name	Email	Phone	Company Name	Contact Role
<a href="#">Edit</a>	✓	Stella Lee	stella.lee@energycenter.org	(703) 639-7375	CSE - Test	Site Owner
<a href="#">Edit</a>	✓	Kelsey Test	kelsey.straub@energycenter.org	(703) 639-7375	CSE - Test	Payee
<a href="#">Edit</a>	✓	Kelsey Test	kelsey.straub@energycenter.org	(703) 639-7375	CSE - Test	Installer
<a href="#">Edit</a>	✓	Kelsey Test	kelsey.straub@energycenter.org	(703) 639-7375	CSE - Test	Equipment Owner

Showing 1 to 4 of 4 entries



[PREVIOUS](#)

[CONTINUE](#)

### Step 3: Site Information

Applicants will need to input their site address at which they plan on installing the Charging Stations. Each site (workplace & MUD) has their own set of requirements that can be found in the program's Implementation Manual under section 2.4 "Site Eligibility Rules." Step 3 questions will populate based on the site type selected. Please see the different options below:

#### 1. Workplace Site

Site Type * ⓘ	Workplace ▼	Is EV charging provided to employees on a preferential basis? *	Yes ▼
Total number of parking spaces *	20	Total number of assigned parking spaces * ⓘ	0
Total number of existing assigned ports * ⓘ	0	Total number of existing unassigned ports * ⓘ	0

#### 2. MUD Site

Site Type ⓘ	MUD ▼	Is this site a hotel/motel? *	▼
		Are at least fifty (50%) of vehicles regularly parked at this site primarily driven by residents? *	▼
		Total Number of Onsite Housing Units *	
		Do all buildings have a minimum of five (5) housing units? *	▼
Total number of parking spaces *		Total number of assigned parking spaces * ⓘ	
Total number of existing assigned ports * ⓘ		Total number of existing unassigned ports * ⓘ	

## Step 4: Equipment Information

Applicants will use the dropdown menu to select the eligible charging equipment that will be installed at the project site. Once selected, they will need to specify the total number of ports as well as the number of assigned ports located at the site. This step will also confirm if the stations are located within a DAC which will calculate the additional incentive allowed for MUD and Workplace sites.

### Charge Ready NY 2.0



#### Equipment Information (Step 4 of 9)

Projects that have received funding for charging equipment from any of the below programs are ineligible for Charge Ready NY 2.0

- NYSDEC's Municipal Zero-Emission Vehicle (ZEV) and ZEV Infrastructure Rebate Program
- NYPA's ReCharge NY Workplace Charging Program
- Federal programs that offer grant funding for EV charging stations, such as the National Electric Vehicle Infrastructure (NEVI) Formula Program and the Charging and Fueling Infrastructure (CFI) Discretionary Grant Program
- Any other NYSERDA initiatives that provide incentives for installing charging equipment, such as the Clean Energy Communities or Clean Green Schools programs.
- Charging Equipment funded entirely (100%) by third parties. This includes Charging Equipment provided to the Equipment Owner by automakers, Electrify America, and other entities.

Projects participating in Charge Ready NY 2.0 may also claim the New York State tax credit for installing charging stations (more information at [https://www.tax.ny.gov/b/t/credits/alt\\_fuels\\_elec\\_vehicles.htm](https://www.tax.ny.gov/b/t/credits/alt_fuels_elec_vehicles.htm)). The tax credit is applied after deducting the funding received from NYSERDA.

An additional incentive of \$1000 per port may be awarded for eligible charging equipment installed at workplace or MUD locations within a disadvantaged community (DAC). Charging equipment installed in assigned parking spaces reserved for the exclusive use of an individual driver at workplace or MUD locations are not eligible for the DAC additional bonus. Only workplace and MUD locations are eligible for the DAC bonus.

The site address entered is not located within a Disadvantaged Community.

Eligible Module	Quantity	Number Of Ports	Number Of Assigned Ports	Incentive Amount	Action
Disadvantaged Community Bonus (\$1000.00 incentive per port)				\$0.00	
	2	4	0	\$12,000.00	

Charging Station Company Name	Model	Quantity	Total Number Of Ports	Number Of Assigned Ports	
- None -	- None -	1		0	<b>ADD</b>

Total Number of Eligible Ports: (5 Unassigned 0 Assigned)	5
Total Number of Ports: (4 Unassigned 0 Assigned)	4
<b>Total Estimated NYSERDA Incentive:</b>	<b>\$12,000.00</b>

## Step 5: Pre-Approval vs Post Installation

After entering in the equipment model information in step 4, the applicant will select if they are applying for pre-approval or post installation. If post installation is selected, the applicant will have to complete step 6 of the application process whereas pre-approval applications will be moved forward to step 7 (document submission).

Application Number: 0000540641

### Charge Ready NY

Installation Status (Step 5 of 9)

Please select application type:

I am applying for pre-approval **prior to installing** charging equipment.

I am applying for a rebate for charging equipment that has **already been installed** and is currently operational.

PREVIOUS SAVE CONTINUE

### Post-Installation Applications:

When the applicant selects the post-installation option, they will be asked to enter in some additional information within step 5. This includes the Actual Date of Charging Station Activation, Total Equipment & Installation Costs, Installer information, 3rd Party Incentive information, and Network Service Provider information.

Actual Date of Charging Station Activation \*

Total equipment cost (as shown on invoice) \*

Total Installation cost (as shown on invoice) \*

Total Third-Party Incentives (other than the Charge Ready 2.0 rebate) \*

#### Installer Information

Installer is same as Equipment Owner (applicant)

Installer Business Name \*

First Name \*

Last Name \*

Title \*

Email \*

Phone \*

Extension

#### Network Service Provider Information

Network Service Provider Business Name \*

## Step 6 (post-installation): Charging Station Information

The applicant will then enter in the station information for each port they are applying for. This information includes the Serial Number, GPS coordinates (to the sixth decimal), Network ID, Description of location, Pay or Free to use, and noting how many ports are assigned if any.

### Charging Station Information (Step 6 of 9)

Enter details for each individual charging station.

Coordinates (latitude and longitude) must correlate to the exact location of the charging station. Be sure to include at least six decimal places in your coordinates. For example:


Latitude: +42.702354

Longitude: -73.857943

Enter the serial number for the specific charging equipment installed; it can be found on the equipment.

Enter the device's network ID number. The network ID is the unique identifier your network provider has given you for the specific charging equipment. For dual port stations, you may have two. If so, enter both.


#### ORCA Incisive - Strada (Single)

Serial Number \* 

GPS Latitude \* 

GPS Longitude \* 

Network Id \* 

Description of where EV charging station is located on site \* 

Assigned

—None—



Will drivers need to pay for electricity dispensed from this charging equipment? \*

—None—



#### ORCA Incisive - Strada (Single)

## Step 7 (post-installation): Required Document Submission

All documentation will be required to be submitted prior to application submission. This includes the Site Map, Building Permit, Equipment Owner Agreement, Installer Agreement (if the installer is the applicant), Site Host Agreement, Charging Station Installer Certification, Agriculture & Markets form, Equipment Payment, Installation Services Payment, Network Services Payment, and all 4 photos for each charging station. Applicants may also submit additional documents under the “Other Documents” section if additional information is required.

### Charge Ready NY 2.0



Project Documents (Step 7 of 9)

Upload all required documentation and any other optional documents that you would like NYSERDA to review as part of your application.

If you need to change an uploaded document, select browse to upload a new document. Please note, the new document will replace the first document. Select 'Attachment History' to view all attachments. Check to make sure you are using the current version of all documents.

Descriptions of requirements for each of the documents can be found in the [Charge Ready NY 2.0 Program Implementation Manual \(PDF\)](#).

The Charge Ready NY 2.0 Equipment Owner Agreement requires a wet signature. All other documents may be electronically signed or wet signed. Click here for the Equipment Owner Agreement Form: [Charge Ready NY 2.0 Equipment Owner Agreement \(PDF\)](#) and the Site Host Agreement: [Charge Ready NY 2.0 Site Host Agreement \(PDF\)](#). If you are an installer submitting an application on behalf of an equipment owner, the [Charge Ready NY 2.0 Installer Agreement \(PDF\)](#) is required as well.

Click here for the Charging Equipment Installer Certification Form: [Charge Ready NY 2.0 Charging Equipment Installer Certification](#)

Click here for the Department of Agriculture and Markets EVSE Notification Form: [Department of Agriculture and Markets EVSE Notification Form](#).

#### Required Documents


Document Name	Recent Uploaded Document	Upload History	Status	Add / Update Document
Site Map				<input type="button" value="Choose File"/> No file chosen
Building Permit				<input type="button" value="Choose File"/> No file chosen
Equipment Owner Agreement				<input type="button" value="Choose File"/> No file chosen
Site Host Agreement				<input type="button" value="Choose File"/> No file chosen
Charging Station Installer Certification				<input type="button" value="Choose File"/> No file chosen
Department of Agriculture and Markets EVSE Notification Report				<input type="button" value="Choose File"/> No file chosen
Equipment Payment				<input type="button" value="Choose File"/> No file chosen
Installation Services Payment				<input type="button" value="Choose File"/> No file chosen
Network Service Agreement				<input type="button" value="Choose File"/> No file chosen
CSEV- AC-DP (SN#) – Customer Support Number Photo				<input type="button" value="Choose File"/> No file chosen
CSEV- AC-DP (SN#) – Installed Site Photo				<input type="button" value="Choose File"/> No file chosen
CSEV- AC-DP (SN#) – Public Charging Equipment Pricing Photo				<input type="button" value="Choose File"/> No file chosen
CSEV- AC-DP (SN#) – Serial Number Photo				<input type="button" value="Choose File"/> No file chosen

## **Pre-Approval Applications:**

When the applicant selects the pre-approval option, they will be moved forward to Step 7 of the application process. Step 6 will be completed once they have been pre-approved and funding is reserved.

### **Step 7 (pre-approval): Required Document Submission**

The Site Map, Building Permit, Equipment Owner Agreement, Installer Agreement (if the installer is the applicant), Site Host Agreement, and Quotes from the installation contractor are the only documents required for pre-approval applications. Applicants may also submit additional documents under the “Other Documents” section if additional information is required.

Required Documents				
Document Name	Recent Uploaded Document	Upload History	Status	Add / Update Document 
Site Host Agreement				<input type="button" value="Choose File"/> No file chosen
Building Permit				<input type="button" value="Choose File"/> No file chosen
Equipment Owner Agreement				<input type="button" value="Choose File"/> No file chosen
Quote(s) from installation contractor				<input type="button" value="Choose File"/> No file chosen

Other Documents				
Document Name	Add / Update Document	Recent Uploaded Document	Upload History	Status
<input type="text" value="Document Name"/>	<input type="button" value="Choose File"/> No file chosen			<span>×</span>
<a href="#">+ ADD ANOTHER DOCUMENT</a>				

## Step 8: Application Review

After completing Steps 1-7, the applicant will review the information entered for all steps in this final review prior to submission. If all information is correct, they may move forward to Step 9 for submission.

Application Review (Step 8 of 9)

Review all application information carefully to ensure that applicant, project contacts and project site(s) information is complete and accurate before continuing.

Application current status: Unsubmitted

### Who is applying?

EquipmentOwner / Installer

### Project Roles

<b>Name</b>	Kelsey Test	<b>Role</b>	Payee/ Applicant	<b>Phone</b>	(703) 639-7375
<b>Email</b>	kelsey.straub@energycenter.org	<b>Company</b>	CSE - Test		
<b>Name</b>	Kelsey Test	<b>Role</b>	Installer/ Applicant	<b>Phone</b>	(703) 639-7375
<b>Email</b>	kelsey.straub@energycenter.org	<b>Company</b>	CSE - Test		
<b>Name</b>	Kelsey Test	<b>Role</b>	Equipment Owner/ Applicant	<b>Phone</b>	(703) 639-7375

## Step 9: Project Submission

The applicant must certify each statement to ensure eligibility prior to submitting for review. The “Submit” option will not populate until every statement has been selected. Workplace Sites and MUDs populate different statements to certify.

Please certify the statements below. Review your application to make sure it is complete before clicking the “SUBMIT” button. Once your application has been submitted, you will not be able to make changes.

You will need to complete the Participant Agreement before your application can be processed. [Click here to submit the Participant Agreement.](#)

- I certify that I have set up my network account to share charging use data with NYSERDA.
- I certify that the parking facility has at least twenty (20) parking spaces that provides EV charging to its employees on a preferential basis over contractors, customers or other visitors parking on-site.
- I understand that I must notify and work with NYSERDA when conducting publicity and media outreach regarding my station installation.
- I certify the Charging Equipment is installed at parking spaces reserved for employees parking at a workplace site on a typical business day.
- I, the Applicant, certify that the above information and all information submitted in this Application is complete, true and accurate, that I have read and reviewed the Terms and Conditions in the Charge Ready NY Equipment Owner Agreement, the Installer Agreement (if applicable), and Implementation Manual and accept all terms. I understand that this project may be disqualified if the requirements of the solicitation are not met. I am authorized to commit my organization to this application.
- I certify that I have not received any incentives from the following programs for the charging equipment installations contained in this application:
  - NYSDEC's Municipal Zero-Emission Vehicle (ZEV) & ZEV Infrastructure Rebate Program
  - NYPA's ReCharge NY Workplace Charging Program
  - Federal programs that offer grant funding for EV charging stations, such as the National Electric Vehicle Infrastructure (NEVI) Formula Program and the Charging and Fueling Infrastructure (CFI) Discretionary Grant Program
  - Any other NYSERDA initiatives that provide incentives for installing charging equipment, such as the Clean Energy Communities or Clean Green Schools programs.
  - Charging Equipment funded entirely (100%) by party(ies) other than the Equipment Owner. This includes Charging Equipment provided to the Equipment Owner by automakers, Electrify America, and other entities.

Please certify the statements below. Review your application to make sure it is complete before clicking the "SUBMIT" button. Once your application has been submitted, you will not be able to make changes.

You will need to complete the Participant Agreement before your application can be processed. [Click here to submit the Participant Agreement.](#)

- I certify that I have set up my network account to share charging use data with NYSERDA.
- I certify that the parking facility has at least twenty (20) parking spaces, there are a minimum of ten (10) total housing units, and that there are a minimum of five (5) housing units per building at the location.
- I understand that I must notify and work with NYSERDA when conducting publicity and media outreach regarding my station installation.
- I certify that more than 50 percent of vehicles regularly parked at this MUD location are primarily driven by residents. Motels/hotels must still check this box.
- I, the Applicant, certify that the above information and all information submitted in this Application is complete, true and accurate, that I have read and reviewed the Terms and Conditions in the Charge Ready NY Equipment Owner Agreement, the Installer Agreement (if applicable), and Implementation Manual and accept all terms. I understand that this project may be disqualified if the requirements of the solicitation are not met. I am authorized to commit my organization to this application.
- I certify that I have not received any incentives from the following programs for the charging equipment installations contained in this application:
  - NYSDEC's Municipal Zero-Emission Vehicle (ZEV) & ZEV Infrastructure Rebate Program
  - NYPA's ReCharge NY Workplace Charging Program
  - Federal programs that offer grant funding for EV charging stations, such as the National Electric Vehicle Infrastructure (NEVI) Formula Program and the Charging and Fueling Infrastructure (CFI) Discretionary Grant Program
  - Any other NYSERDA initiatives that provide incentives for installing charging equipment, such as the Clean Energy Communities or Clean Green Schools programs.
  - Charging Equipment funded entirely (100%) by party(ies) other than the Equipment Owner. This includes Charging Equipment provided to the Equipment Owner by automakers, Electrify America, and other entities.