nationalgrid

Closeout Documents Checklist

All the documents below are required to close out a project. **Please note the first 7 items should have been submitted before receiving approval. However, please check to make sure there are no missing responses or signatures.** All documents should be uploaded directly to the CE 2.0 portal.

- ☐ Estimate
- ☐ Site Plan
- ☐ Signed Agreement
- ☐ Terms and Conditions
- ☐ Authorized Signatory
- ☐ Assignment of Incentive
- ☐ Publicly Accessible and Fleet Environmental Justice Community Certification

- ☐ As Built Site Plan
- ☐ Pictures of EVSEs – If civil work was required, please include pictures of the transformer pad and bollards
- ☐ Sessions Report – report must include networking IDs, date of charge, and usage
- ☐ City or Town Permit
- ☐ Invoice Template – signed by customer with both tabs completed
- ☐ Customer Invoice (showing total project costs incurred)
- ☐ Third Party Funding Verification Form (reporting whether or not third party funding was also used)
- ☐ Customer and Payee W9s
- ☐ Final Rebate Document (prepared after the above documents are received)

Please use the following naming convention when adding documents:

IAxxxx.[DocumentName].[CustomerName]

Example: IA6540.FinalRebateDocument.ABCompany