

Electric Vehicle Charging Station Make-Ready Program and Load Management Technologies Incentive Program

Project Closeout Checklist

Customers or installation contractors acting on behalf of the customer will need to provide the following forms and documents. This checklist is applicable to projects in both the Make-Ready Program and the Load Management Technologies Incentive Program (LMTIP). All documents are required by National Grid prior to issuing the EV-MRP incentive payment. Please be sure documents are labeled using proper naming conventions with IA/CE number. Once received, incentive payments can be made in as little as 10-15 business days.

- ☐ **Project Quote Form** — 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** — 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(s)** — 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** — Must use the [EVSE Worksheet](#) provided by National Grid
- ☐ **As-Built Drawings** — Both drawings must be provided in PDF format
 - Single Line Electrical Schematic
 - Installed Dimensioned Site Plan
 - For projects in both Make-Ready and LMTIP, identify which equipment and lengths are Make-Ready and which are LMTIP
- ☐ **Proof of Active and Operating Station(s)** — Export from network showing a charging session occurring at each station.
 - Additional details on acceptable reports: [Session Report Requirements](#)
 - Activation on PlugShare or another station-finding app (required for publicly accessible stations only)
- ☐ **Project Photos** — Photos of the completed project including stations (individual and grouping). Submissions must be in PDF and/or JPEG format. Photos must include:
 - All new equipment
 - All interior and exterior work
 - Up-to-date contact information for the Network Service Provider displayed on each EVSE
 - Signage and painting work to support reserving parking space for EV charging only (Required for curbside projects only)
- ☐ **Invoice to National Grid** — The invoice should contain, at minimum the following:
 - FROM: The entity receiving the incentive payment
 - TO: National Grid
 - Amount: The approved EV MRP Incentive Amount
 - The IA/CE number (IA-0000000000 or CE-0000000000)
 - Values on the Invoice must match the Project Quote Form
- ☐ **W9s** — Copies of the W9s for both the customer AND the approved contractor/installer, regardless of which entity is receiving the incentive payment
- ☐ **Assignment of Incentive Form** — If applicable, the [Assignment of Incentive Form](#) must be signed by the customer
- ☐ **Load Management Software Contract and Setting** — Only Required for Projects Receiving Incentives for Load Management Software
 - Copy of the contract between the customer and the software provider including the length of the contract and the price per month or year
 - Proof the load management settings (as described in the application) have been set in the software. This can be a system download or screenshot. Submissions must be in PDF and/or JPEG format.

Note:

- A sample of projects will be selected for post inspections to verify installations with invoices and documentation provided prior to incentive payment.
- For software only Load Management Technologies Incentive Program (LMTIP) projects, contact the National Grid EV team at EVNationalGridUNY@nationalgrid.com as some of the checklist items may not be required.