SRP PowerClerk

Residential Applicant User Guide

Delivering water and power®

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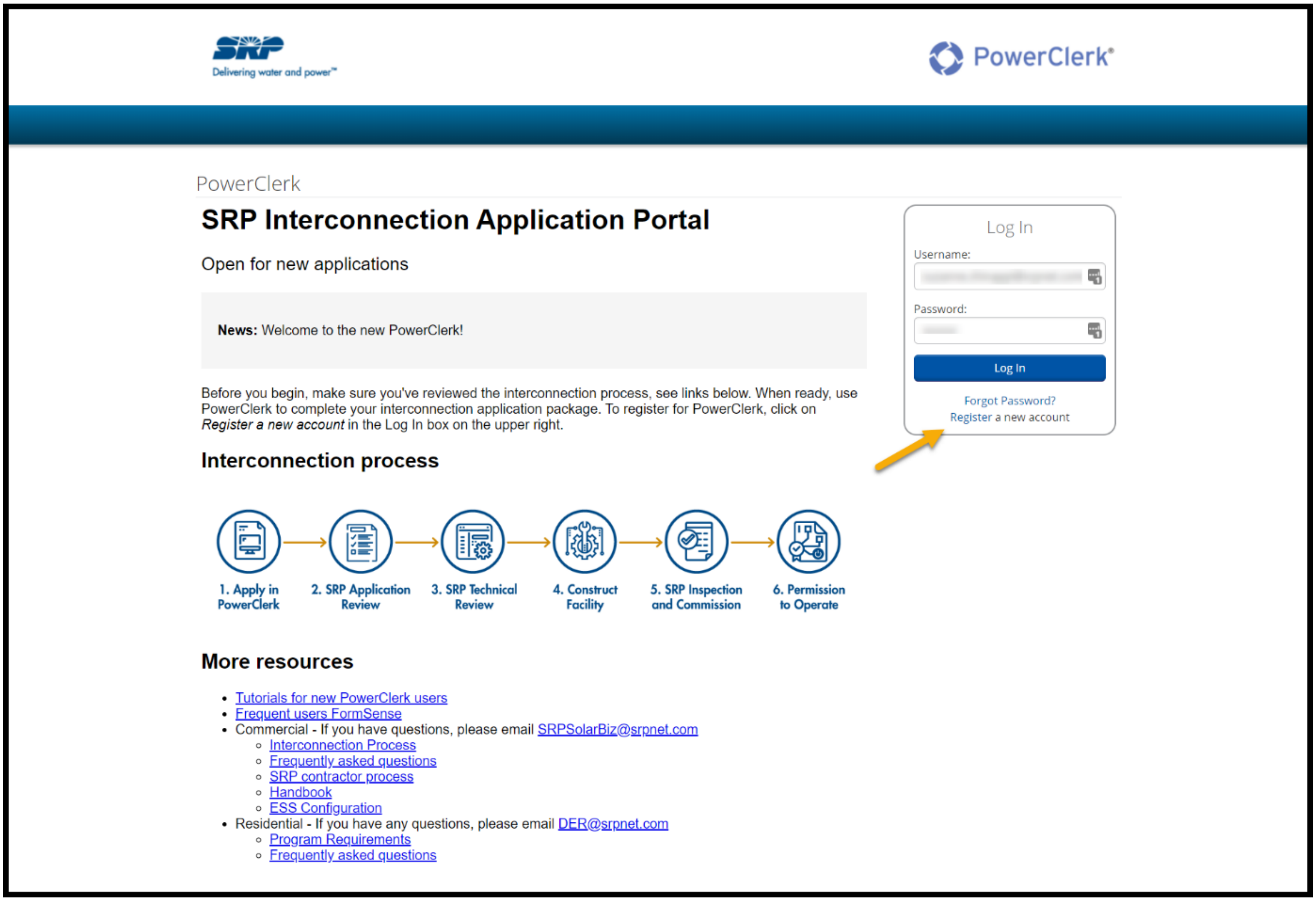
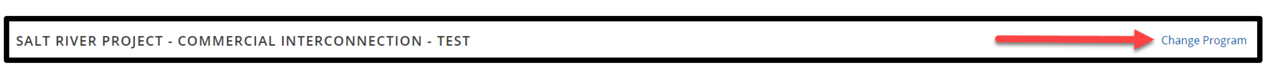
A. Accessing PowerClerk

The SRP portal is located at srpinterconnect.powerclerk.com.

Instructions for new users on how to register can be found on the login page. Registration to the site must be completed before you can access the portal. To register, click on **Register a new account** located under the blue **Log In** button.



If you have a PowerClerk account with APS, Go to Settings > Add Programs > Program to Add: Agency, select SRP from the dropdown, then, select Add Program. To change between other utilities, click on the "Change Program" on the top right.

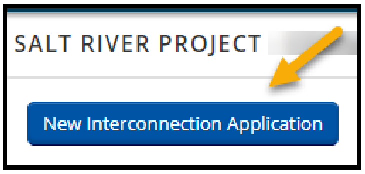


The SRP PowerClerk dashboard page will appear as below. The dashboard is designed to provide a list of active applications within their respective process status.

1. **All Projects:** This view contains a list of all projects. Here you can keep track of all projects, whether they are unsubmitted or submitted.
2. **Initial Review:** Once an application has been submitted, it will move to Initial Review. In this status, SRP is reviewing the application to ensure it meets all program requirements.
3. **Design Review:** This view contains a list of all applications in this process status.
4. **Expedited Review:** For projects greater than 300 kW-AC, a study is required by various distribution technical teams. For additional details, please visit srpnet.com/environment/solar/business/docsandforms.aspx.
5. **Detailed Review:** For projects 1 MW AC and above, a more in-depth study is required by various distribution technical teams and will address the requirement for telemetry. For additional details, please visit srpnet.com/environment/solar/business/docsandforms.aspx.
6. **Corrections Required:** When an application is denied in Initial Review or Design Review or turned down in Final Inspection, it will move into this status and will require action on your end.
7. **Construction:** This status is given when an application is being installed and SRP still requires City Clearance (CC) or a Certificate In-Lieu of Electrical Clearance (CILC).
8. **Final Inspection:** Once an application has passed Initial Review and Design Review and we have received CC or a CLIC, the application will move into this status. This does not replace the process for scheduling an inspection via SharePoint.
9. **PTO:** This status is for commercial interconnections.
10. **Completed:** This view contains a list of commissioned applications.
11. **Unsubmitted:** This view contains a list of all unsubmitted projects.
12. **New Battery Spec Request:** This view contains applications that are waiting for new battery specification approvals.

B. Initiating a New Application

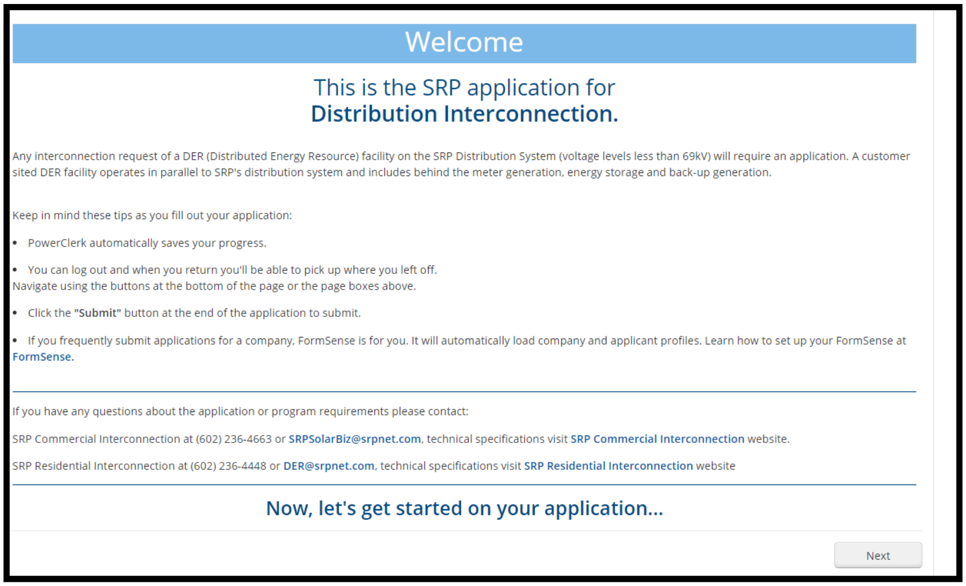
1. Click the **New Interconnection Application** button to begin.



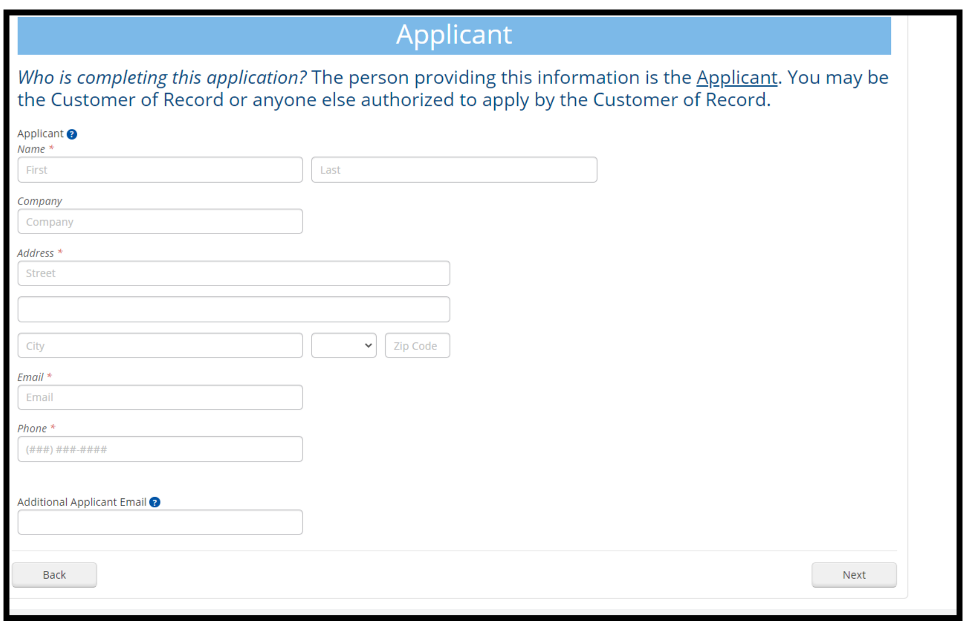
2. The Application form is composed of nine pages:

- Welcome
- Applicant
- Customer
- Installer
- System Owner
- Interconnection
- System Information
- Documents
- Submit

B.1. Welcome

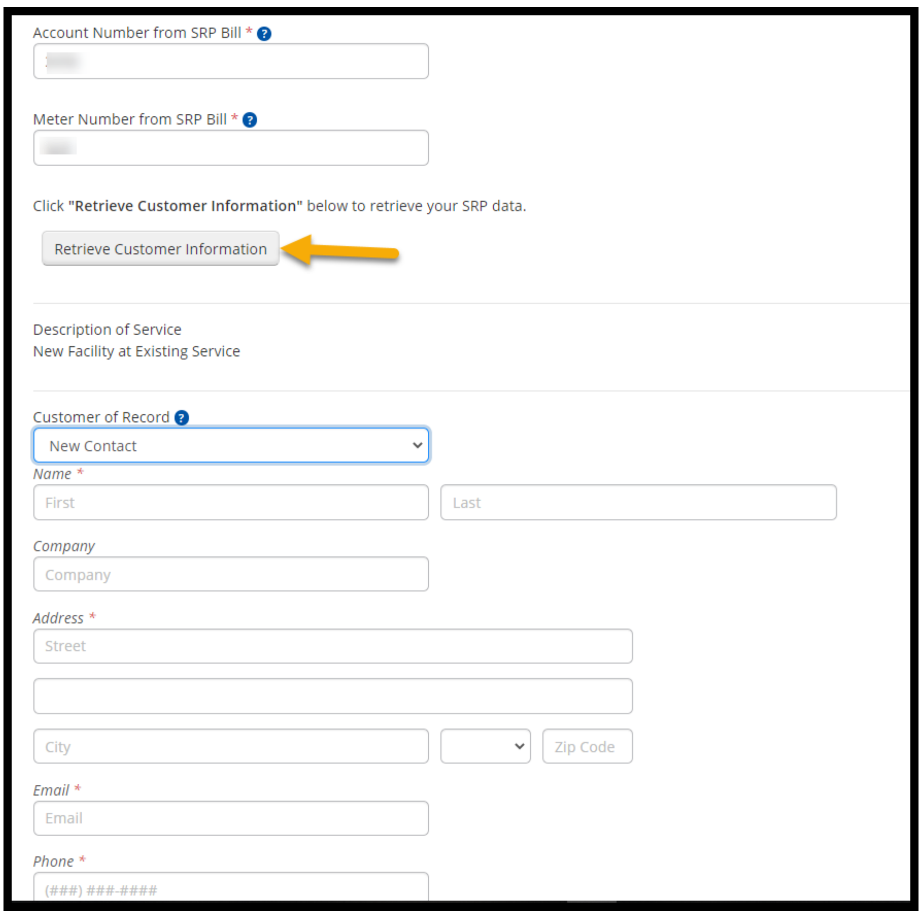


B.2. Applicant



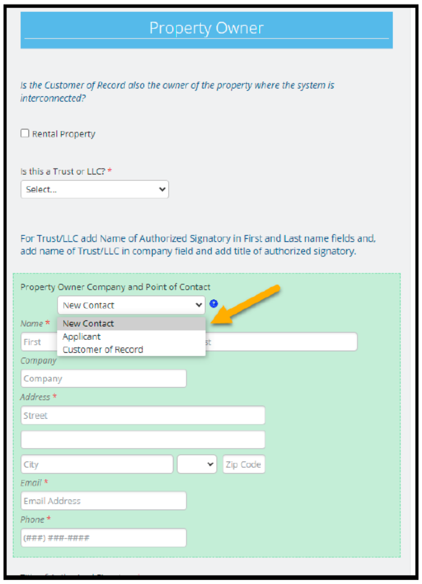
B.3. Customer of Record

1. If the customer has an SRP account at this site, select **Yes**.
2. Enter the customer's SRP account number and billing meter number, then click **Retrieve Customer Information**. If there is no meter, type "0" in the Meter Number field.
   - The customer's name, address information and current price plan will populate validating the information provided against SRP's Customer Information System.



3. Enter the customer's email address and phone number.
   - All communications will be sent here.
4. Select **Yes** or **No** for the following question: Is access to any required metering by SRP personnel in any way restricted or impeded (locks, gates, walls, etc.)?
5. If property is a rental, select **Rental Property**.

6. If property is in the name of a trust or LLC, select **Yes** from the drop-down menu, select **New Contact**, and then fill in the required fields. Enter Trust or LLC name in the "Company" field and select the "Title of Authorized Signatory."

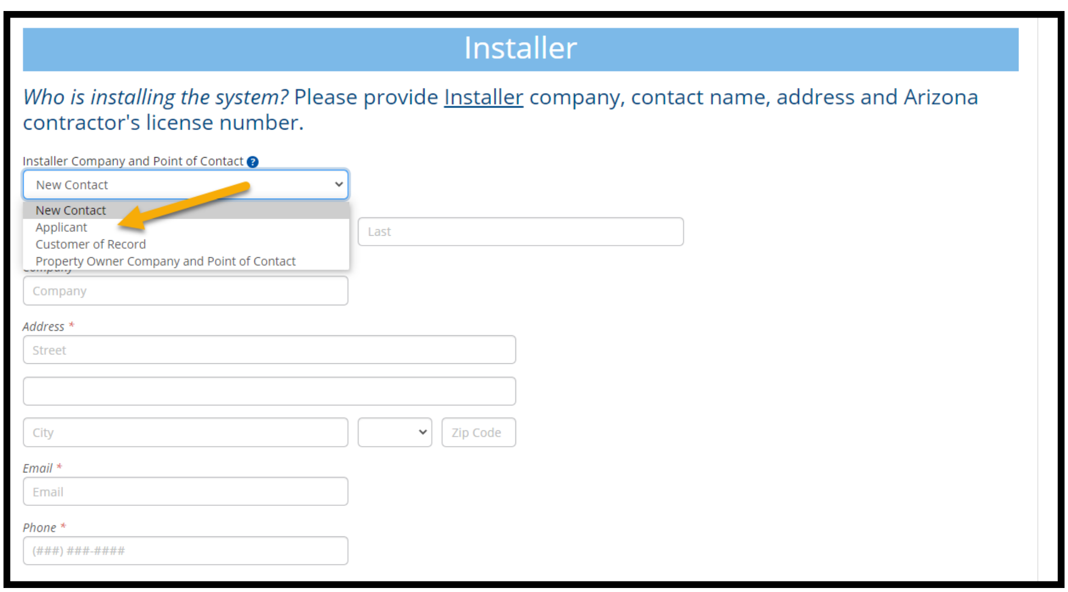


7. If the customer of record is the property owner, select **Customer of Record** from the drop-down menu. Otherwise, select **New Contact** and fill in all the fields.

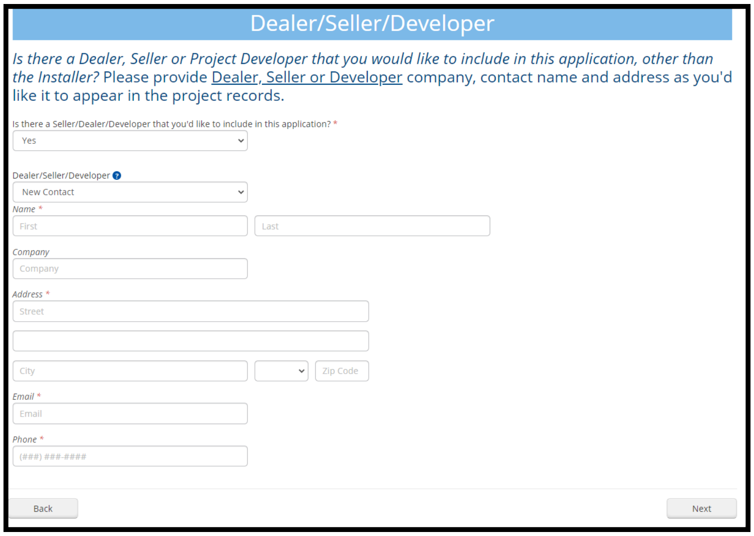
8. Click **Next** when ready to move to the next page.

B.4. Installer

- If the installer is the same as the applicant, select **Applicant** from the drop-down menu and the applicant information will automatically populate.



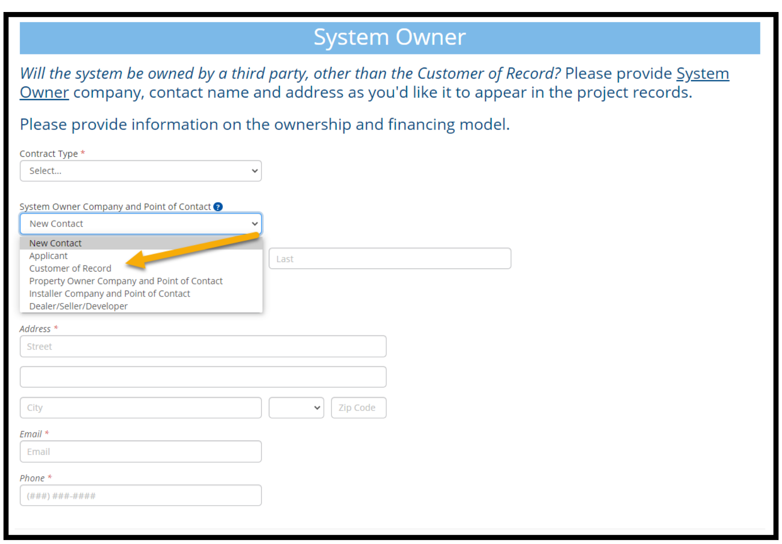
- If there is a separate dealer, select **yes**, select new contact and then enter the contact information for the dealer.



- Click **Next** when ready to move to the next page.

B.5. System Owner

1. In contract type, if the system owner is the same as the customer, select **Customer of Record** from the drop-down menu. If the system owner is the property owner, Trust or LLC, then select **Property Owner** from the drop-down menu. If it is someone else, then select **New Contact**.



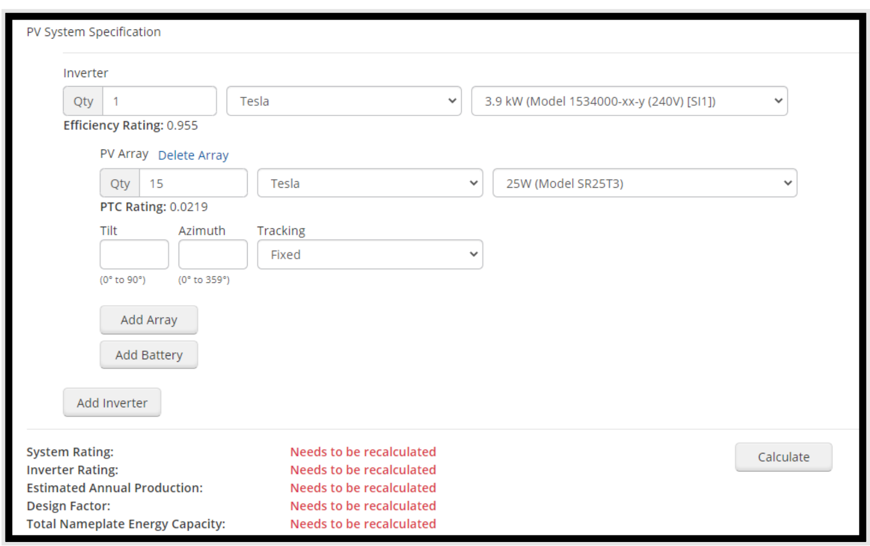
2. Click **Next** when ready to move to the next page.

B.6. Interconnection

1. Select either **Line Side Tap** or **Load Side Tap**.
2. Choose the inverter voltage from the drop-down menu that is being added.
3. Click **Next** when ready to move to the next page.

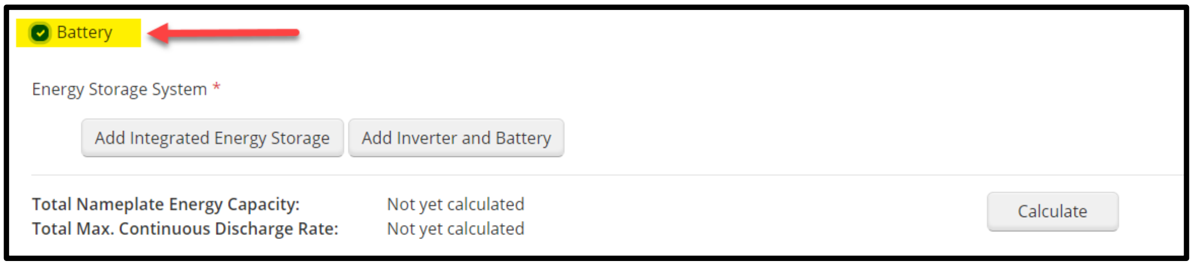
B.7. System Information

1. Select the project scope: **Generation**, **Storage**, or **Generation & Storage**.
2. Identify the type of generation: Inverter-Based or Spinning Mass.
   - If Inverter-Based:
     1. Specify the Inverter: quantity, manufacturer and model.
     2. Specify the PV Array: quantity, manufacturer and model.
     3. Enter the Tilt, Azimuth and Tracking of the array.
     4. Tracking is fixed, single-axis or dual-axis.
     5. If an additional inverter or array is needed, click on either **Add Inverter** or **Add Array**.
     6. Press the **Calculate** button to determine the PV DC rating, Inverter AC rating and Energy Capacity if there is a battery attached to the PV inverter.



NOTE: If you have selected **Generation** as the project scope, DO NOT use the **Add Battery** button. This will give you an error message. To add a battery project, you must select **Generation & Storage** or **Storage** only.

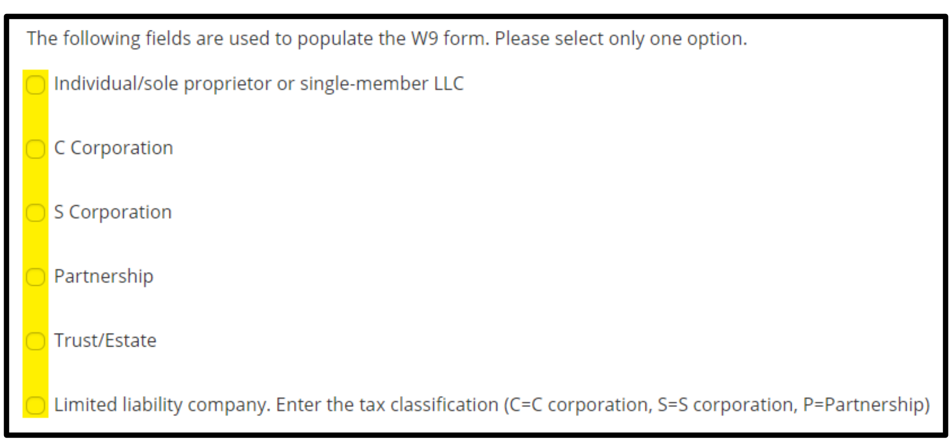
- If installing a battery that is connected to the PV inverter, add the battery in the PV system specification section. If installing a battery that has its own inverter or is an integrated battery, then select the battery checkbox and add the battery to the Energy Storage System Component (see screenshot below).
- Press the **Calculate** button to determine the Total Nameplate Energy Capacity (kWh) and Total Max. Continuous Discharge Rate (kW).



- If the battery that is being installed is not on the list of batteries, then upload the battery specifications for the new battery in the field provided.
    1. Select the type of ESS configuration.
    2. Choose the primary battery use.
    3. Provide the battery location.
    4. Select **yes** or **no**: Is battery located in a climate-controlled space?
    5. Select **New Price Plan**.
    6. Select **yes** or **no**: Does the project include a Demand Management System?
    7. Provide the total cost of the system.
    8. Click **Next** when ready to move to the next page.

B.8. Documents

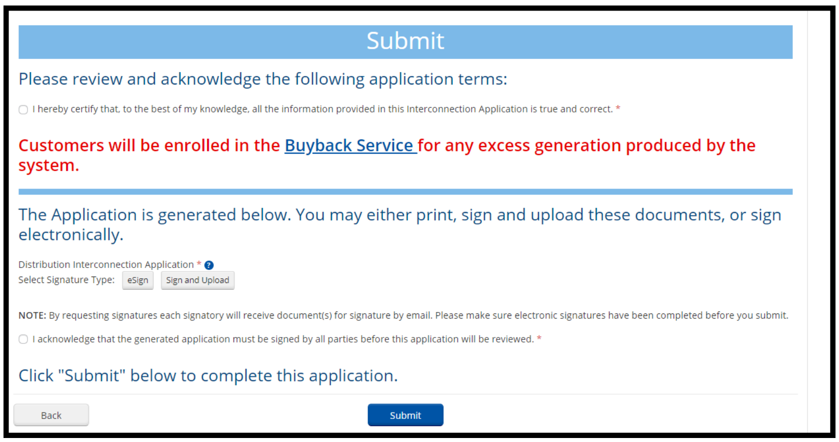
1. Upload all required documents (marked with a red asterisk*).
2. If the customer is applying for a rebate, they must submit a W9. Select **one** option from the highlighted fields below:



3. Click **Next** when ready to move to the next page.

B.9. Submit

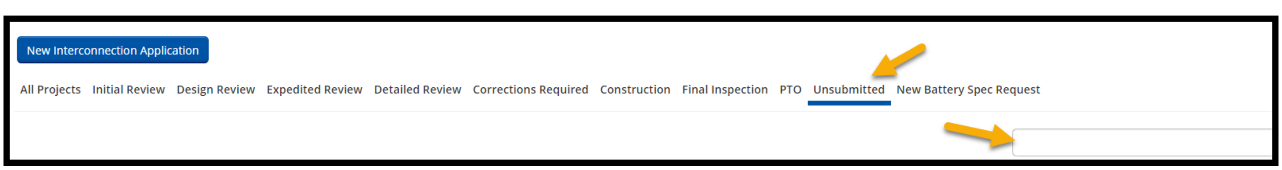
1. Applicant must confirm that the information provided on the application is true and correct.
2. If the customer is electing to provide a wet signature, click on **Sign and Upload**.
3. If the customer is electing to **eSign** all documents, select **eSign**. Then, click on **Preview Document** to preview the Distribution Interconnection Application and any other documents that are visible.
4. Once documents have been previewed, click on **Request Signatures**. An email from DocuSign will be sent to each recipient for document eSignature.



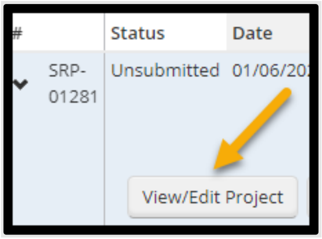
5. After the documents have been sent for eSignature, the application can be closed. All application data has been saved. An application cannot be submitted until all required signatures have been received.

B.10. Submitting Application After Signatures Are Complete in DocuSign

1. Unsubmitted applications can be found under the **Unsubmitted** or **All Projects** views on the dashboard page.
2. Once eSignatures are received, locate the application by searching for customer name or address in the search box.

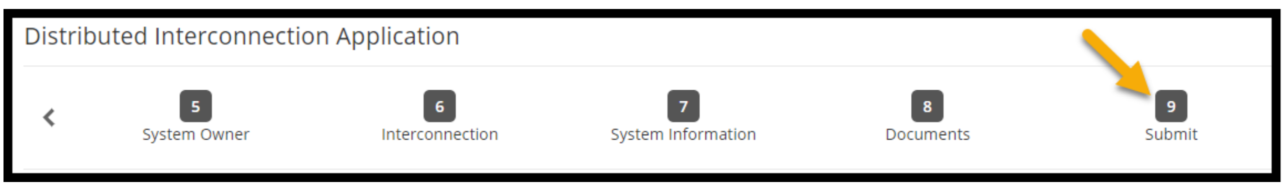


3. Click on the arrow in the first column, then click **View/Edit Project**.

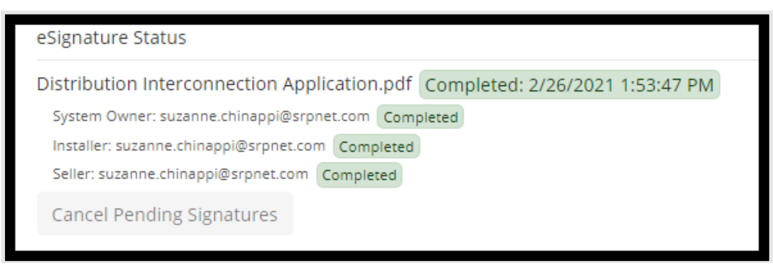


4. Under **Available Forms**, locate the **Interconnection Application** form and click **Continue**.

5. Go to **Page 9**.



6. All signatures will show as **Completed** with a time stamp. Click **Submit**.

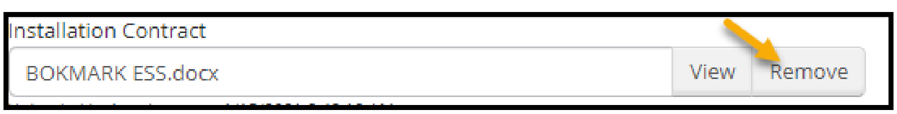


- When the application is successfully submitted, a project number will be generated. Click **Continue**.
- The application status has been changed to **Initial Review** and is now ready for SRP review. There will be a communication sent stating that the application has been received.

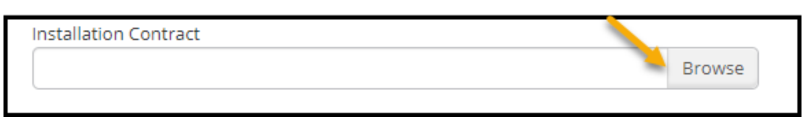
C. Application Corrections Required

1. There will be a communication sent stating that the project requires corrections.
2. On the dashboard page, click on **Corrections Required** to locate projects that require corrections. Use the search box to search by project number or address.
3. Click on the arrow in the first column, then click on **View/Edit Project**.
4. Under **Available Forms**, locate the **Application/Design Corrections** form, then click **Begin**.

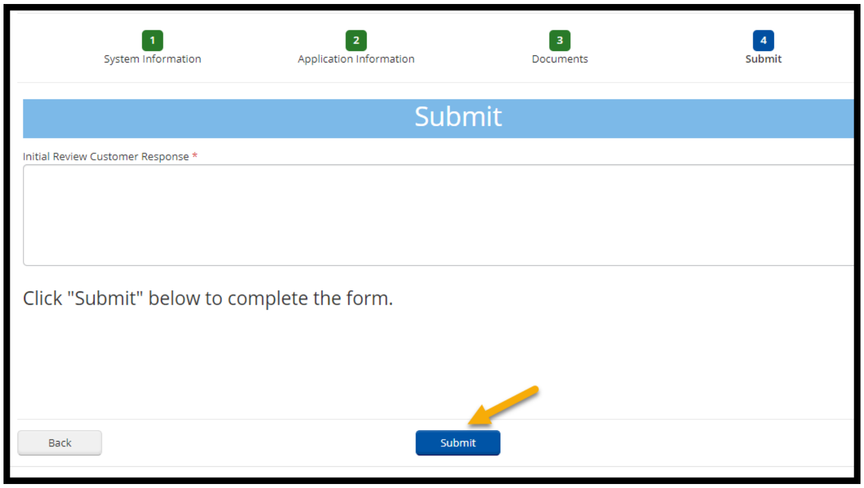
5. There are four pages on this form:
    - On Page 1, review the corrections needed (located in the **first box**). The comments are located below Initial Review Comments.
    - Page 1 also displays the equipment selected.
    - Page 2 displays the customer of record information.
    - On the Documents page, remove and replace deficient attachments (if necessary).
    - Click **View** to download the attachment.
    - Click **Remove** to remove the attachment.



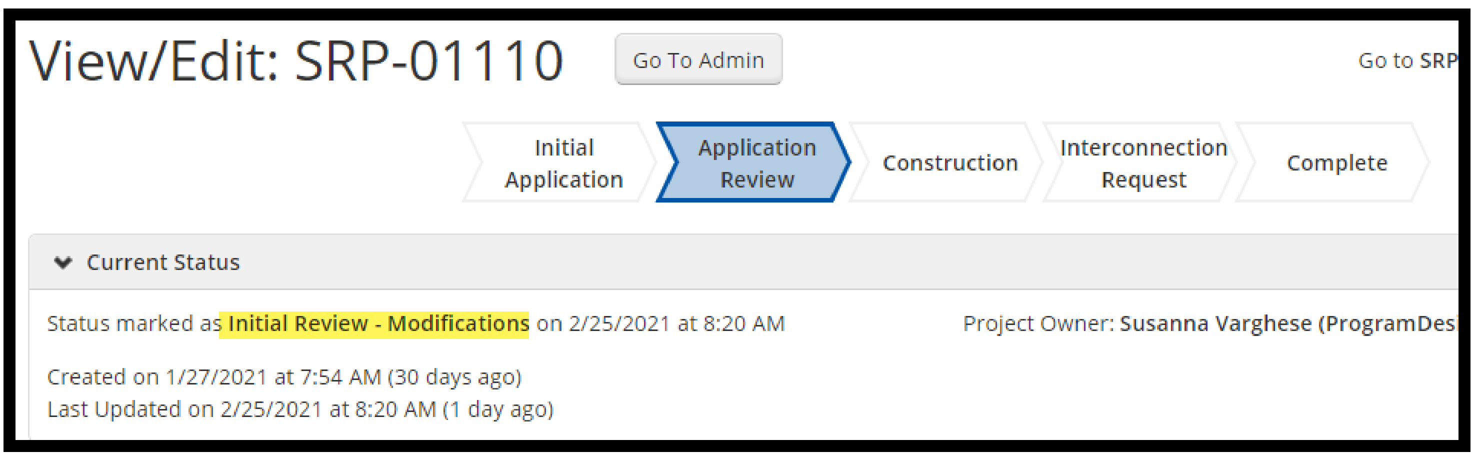
- Click **OK** when you get the Confirm remove message.
- Click **Browse** to upload a corrected document.



- Please explain what changes have been made before submitting on Page 4.



6. The project status will automatically change to **Initial Review - Modifications** and it is now ready for SRP review.



D. Design Corrections Required

1. There will be a communication sent stating that the project requires corrections.
2. On the dashboard page, click on **Corrections Required** to locate projects that require corrections. Use the search box to search by project number or address.
3. Click on the arrow in the first column, then click on **View/Edit Project**.
4. Under **Available Forms**, locate the **Application/Design Corrections** form, then click **Begin**.

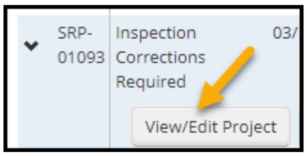
5. There are four pages on this form:
   - On Page 1, review the corrections needed (located in the **first box**).
   - Page 1 also displays the equipment selected.
   - Page 2 displays the customer of record.
   - On the Documents page, remove and replace deficient attachments (if necessary).
   - Click **View** to download the attachment.
   - Click **Remove** to remove the attachment.

   - Click **OK** when you get the Confirm remove message.
   - Click **Browse** to upload a corrected document.

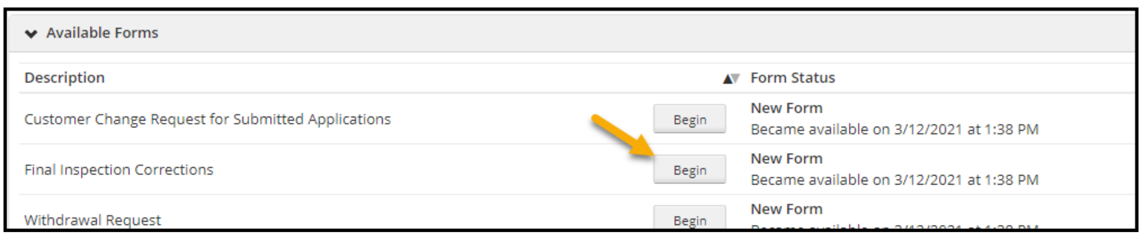
   - Please explain what changes have been made before submitting on Page 4.

E. Inspection Corrections Required

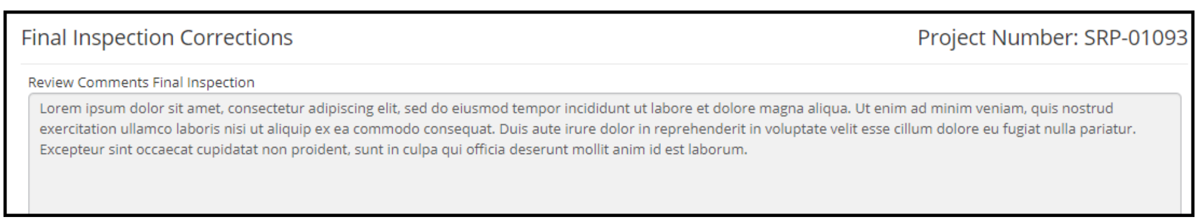
1. There will be a communication sent stating that the application requires revisions.
2. On the homepage, click on **Corrections Required** to locate projects that require revisions.
3. Click on the arrow in the first column, then click on **View/Edit Project**.
   - Or, search by project number or site address in the search box to locate a specific project.



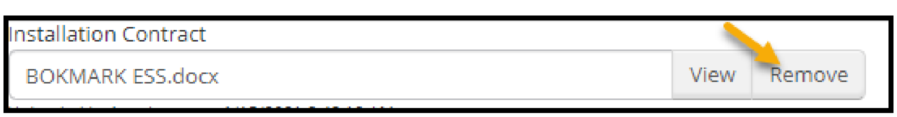
4. Under **Available Forms**, locate the **Final Review Corrections Needed** form and click **Begin**.



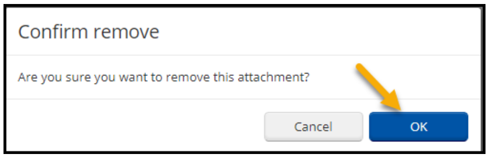
5. Corrections needed will be noted in the comment box.



6. Deficient documents will be noted at the bottom of the form. To replace a deficient document, click **Remove**.



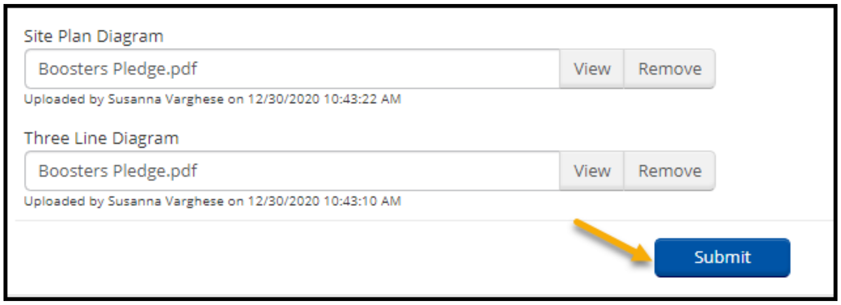
7. Click **OK**.



8. Click **Browse** to locate the corrected document.

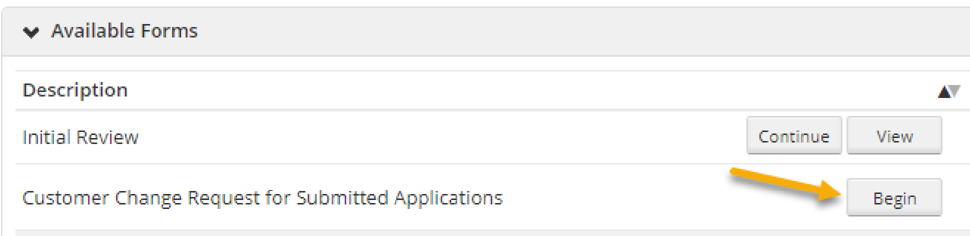
9. Enter Corrective Action Taken in the box provided.

10. When the revised attachments have been uploaded, click **Submit**.

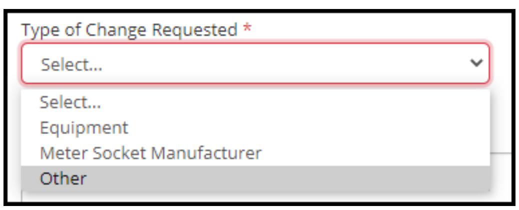


F. Customer Change Request

1. The **Customer Change Request for Submitted Applications** form will be available after the application is submitted and until permission to operate has been given.
2. Locate the **Customer Change Request for Submitted Applications** form under Available Forms, then click **Begin**.

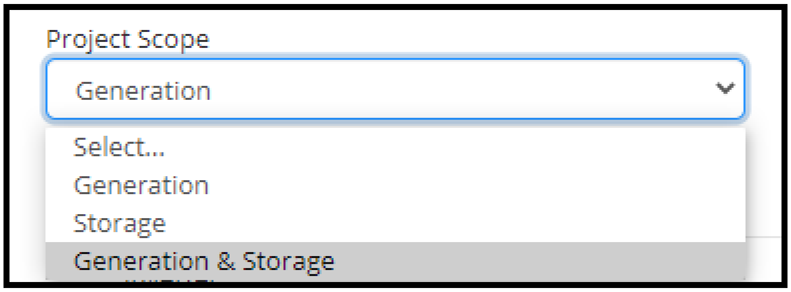


3. Enter the name of the person who is making the request.
4. Select the type of change requested from the drop-down menu.

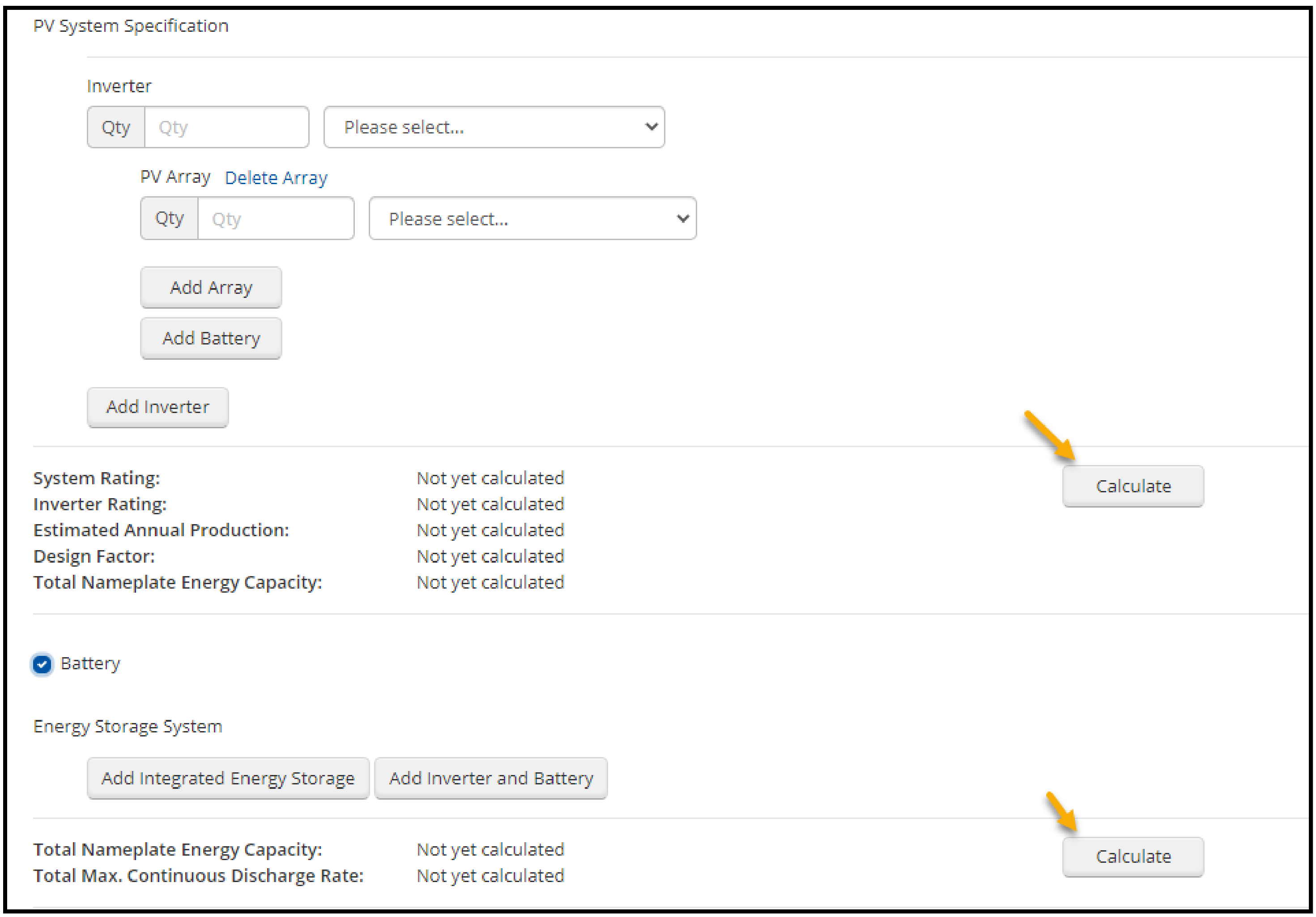


5. Please describe the requested changes.

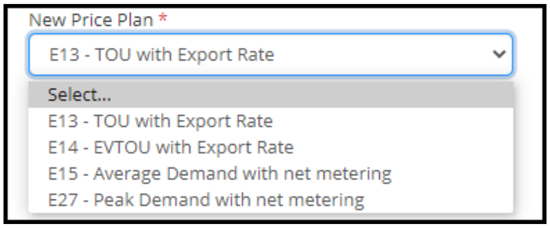
6. Update the **Project Scope** if it is changing.



7. If there is a change to a PV or battery model or manufacturer, then enter the new inverter and module information. Make sure you press the calculate button to recalculate the size of the system.



8. If there is a change to the **Price Plan**, then select the correct one from the drop-down menu.

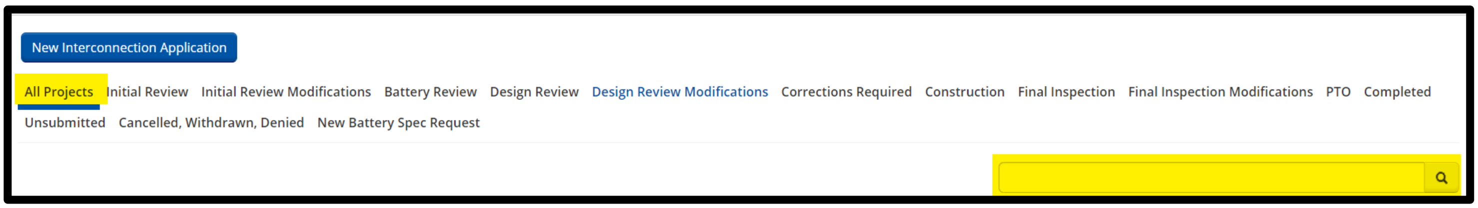


9. If removing or adding a Demand Management System, fill in those fields.
10. Upload a new three-line diagram and site plan that shows these equipment changes.
11. Enter the date you are requesting the change.
12. **A new Interconnection Agreement is required when changes are made to the system AC capacity or system owner. Sign the new application and a new Interconnection Agreement.**
13. Click **Submit**.
    - The status will change to **Initial Review - Modifications** and be sent back to the SRP queue for review.

G. Withdrawal Request

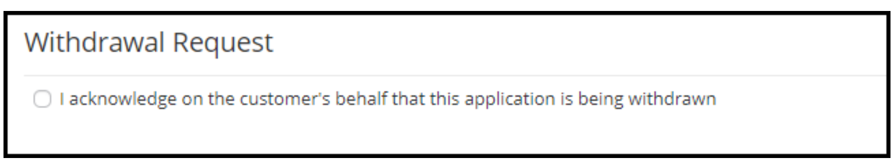
1.1. The **Withdrawal Request** form will be available after the application is submitted and until permission to operate has been given.

1.2. On the dashboard, select **All Projects** and search the customer's name or project number in the search box.



- Once the customer record has been located, click on **View/Edit Project**.
- Click **Begin**.

1.3 Check the box requesting the withdrawal of the application.

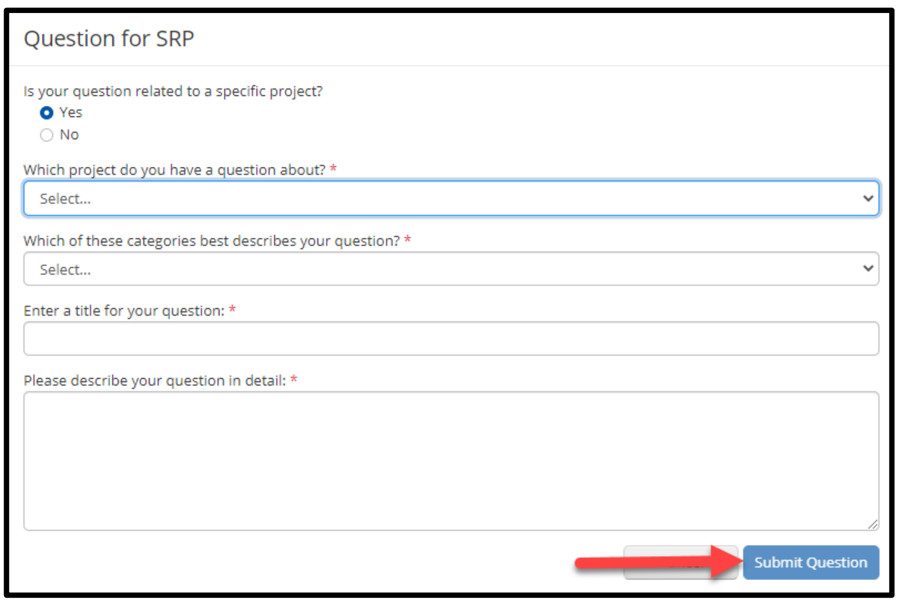


1.4 A communication will be sent to the customer confirming that the application has been withdrawn.

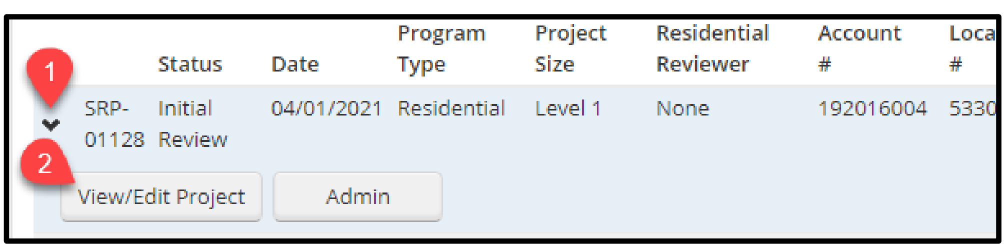
H. Question for SRP

1.1. To send a **Question for SRP,** click on "Question for SRP" button.

1.2. If the question is specific to a project, **select "Yes"** and continue to respond to the remaining questions, then, click "Submit Question".



1.3 To view responses for Question for SRP that are application specific, click on View/Edit Project in the application record.



1.4 Scroll down to “Question for SRP Threads” and you will see SRP’s reply.