PowerClerk Applicant Training Guide

September 2022

City of Fort Collins Utilities

PowerClerk®

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PowerClerk Overview

PowerClerk as an application portal for Fort Collins Utilities DE Applications

Rollout schedule

Account Registration

How to register and verify a new account, or add programs to an existing account

Application Process

How to submit new applications using PowerClerk

PowerClerk Home / Project Page

Navigating between multiple projects

Available Forms

Additional forms available through the application process

Requiring Support

How to ask a question when using PowerClerk

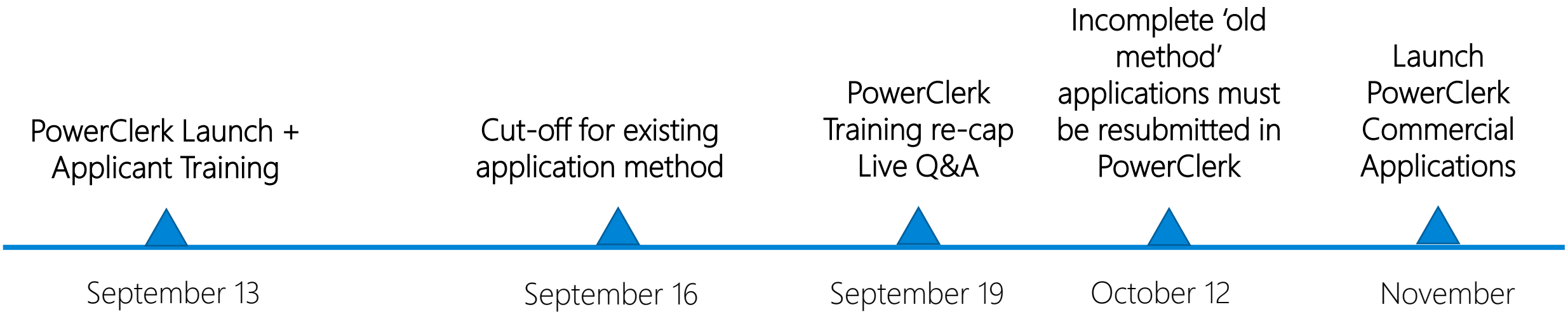
PowerClerk Overview

PowerClerk is the online application portal for Fort Collins Utilities Distributed Energy Interconnection Applications and will be used to:

- Create and submit new DE Interconnection Applications
- Monitor the progress of DE Interconnection Applications
- Send and receive notifications about project/application status and updates
- Submit all DE Interconnection related information

PowerClerk Launch
September 13, 2022

PowerClerk Rollout Schedule



Feedback Period
OK: new email applications using existing business process, revisions and updates to incomplete applications

After Sept. 16, enter ALL new applications through PowerClerk
NO New email applications accepted
OK: revisions to prior submission
OK: review and processing prior submissions in existing process

In-Flight projects that have been approved for construction will be managed in existing process through PTO

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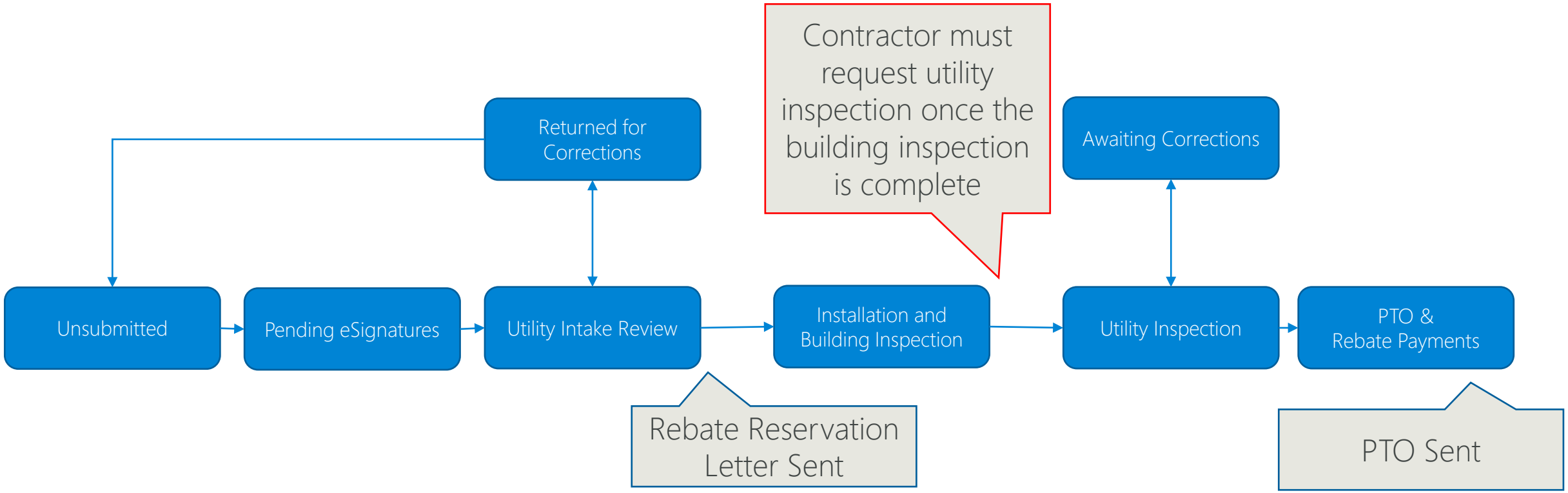
Fort Collins Utilities PowerClerk Process Overview



Account Registration

How to Create a New PowerClerk Account / Register an Existing Account

New Account Registration

Step One

- Click the **Register** link below the Log In Section

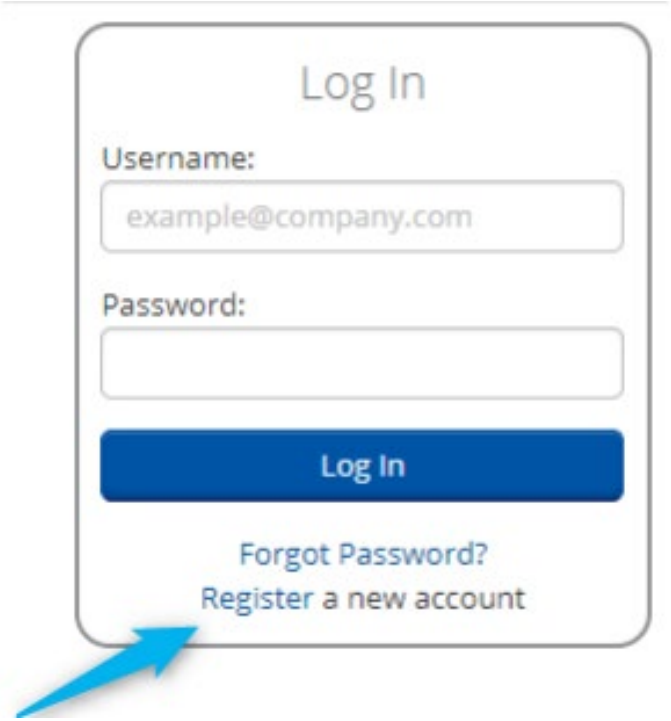
Step Two

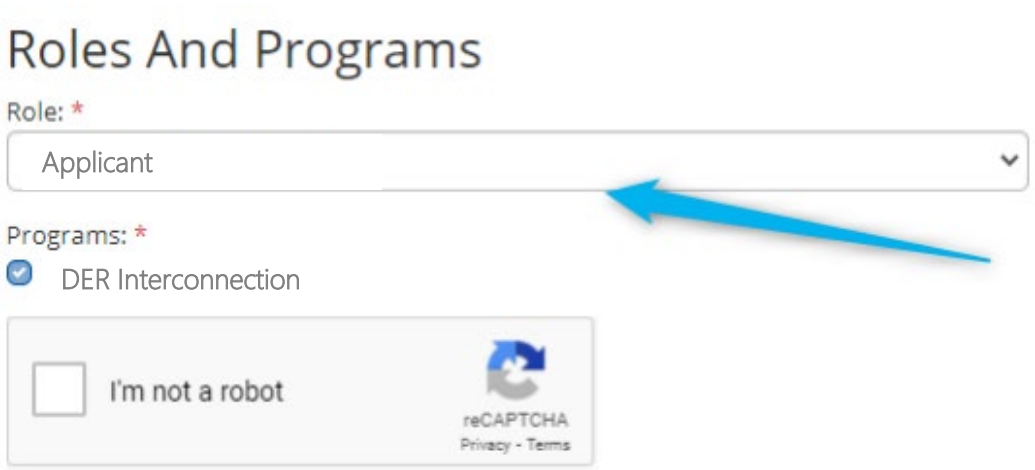
- Complete the User Information form.
- Under "Roles and Programs" select "**Applicant**" and select Register

Step Three

- Check your email inbox for an email titled, **"PowerClerk Account Creation"**
- Open the email and follow the instructions provided.

Note: If you have not received your account creation email within 10 minutes, please look through your junk/spam folders.





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Already have a PowerClerk Account?

Step One

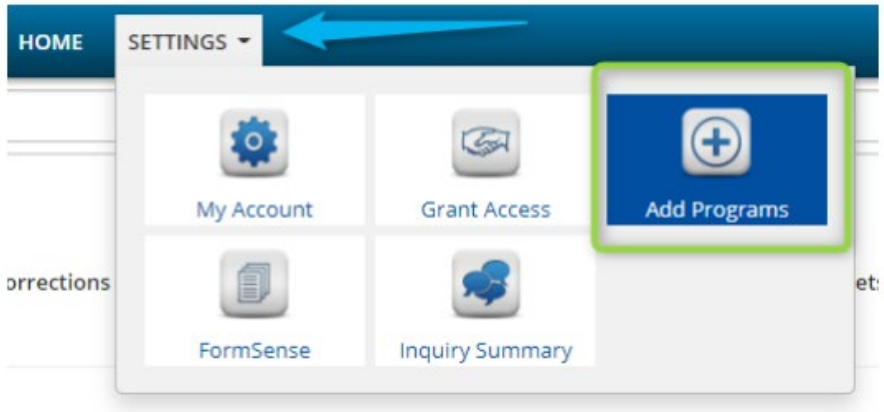
- Log Into your PowerClerk account. Any PowerClerk account will do.

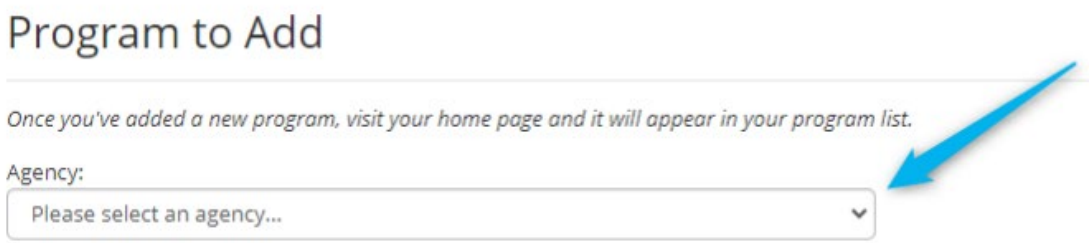
Step Two

- Select the Settings Menu and select **"Add Programs"**.

Step Three

- Under "Program to Add" select City of Fort Collins Utilities.





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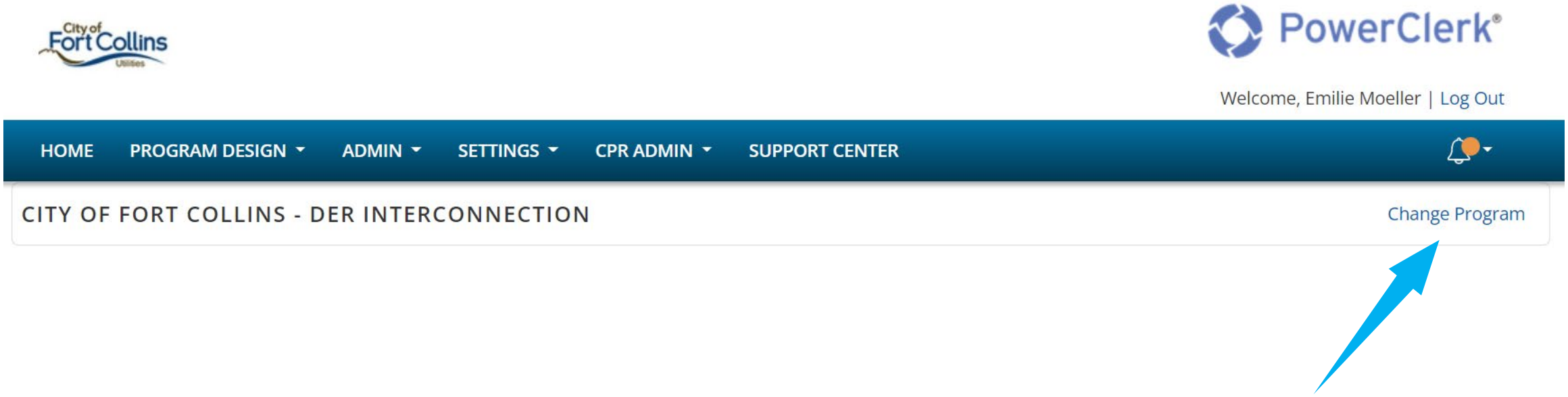
Navigating PowerClerk Programs

Select **Change Program** to switch between all programs added to your account.

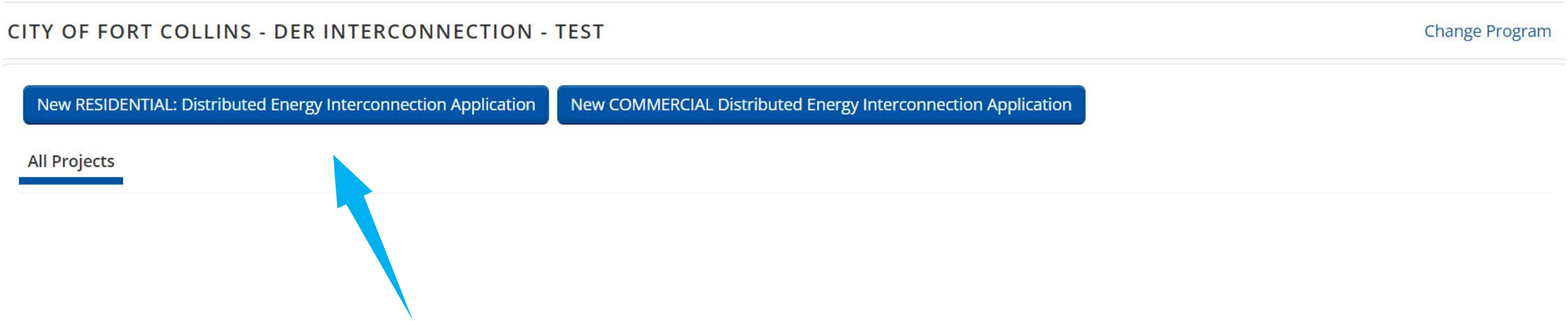


Application Process

New Applications

Upon logging into PowerClerk you will see **two blue buttons** at the top of your screen.

Depending on your project type, select one of the new application options at the top of the PowerClerk screen to begin your new application.



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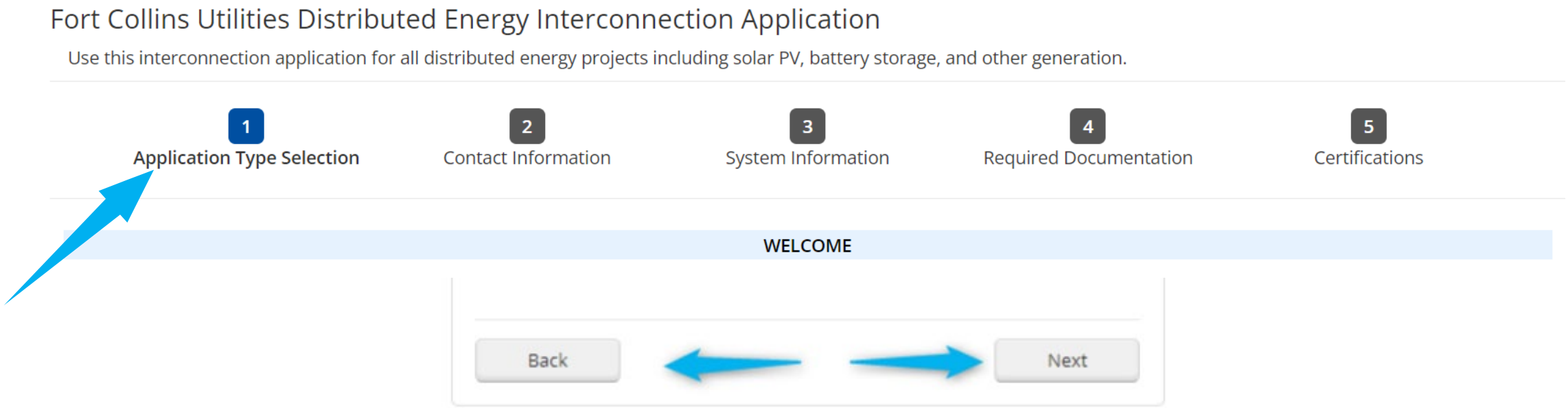
Application Navigation

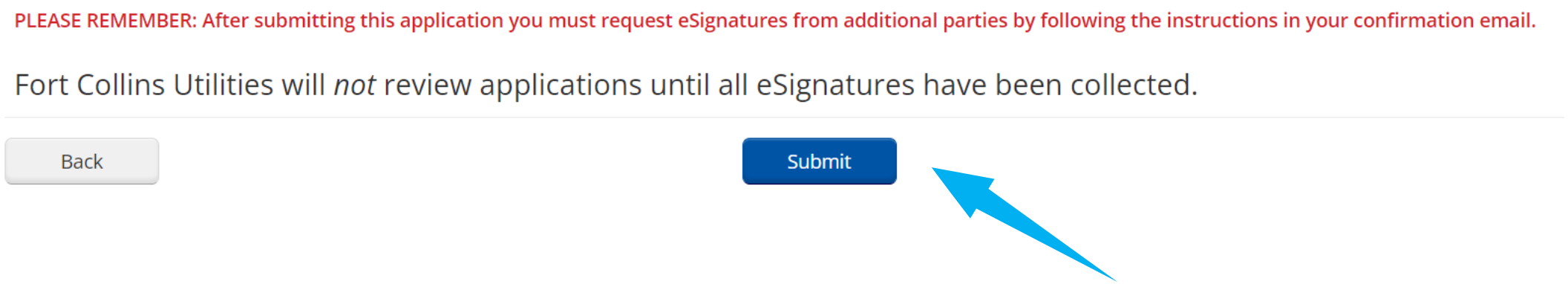
After selecting your request type, the **Application Page Numbers** will appear at the top of the form.

To quickly move to a specific part of the form, select one of these numbered page boxes.

To navigate from page to page, select the **"Back" or "Next"** buttons at the bottom of the page.



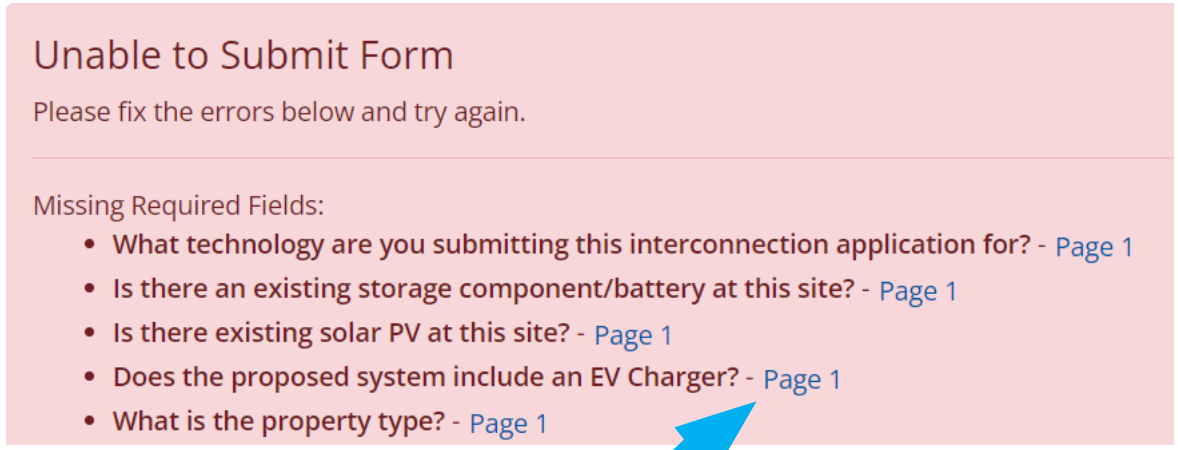
Application Submission



To **submit** the application, click the blue "Submit" button at the bottom of the last page.

If any required information has not been entered, a red section will appear at the bottom of the page when you select "Submit".

Select the **blue page link** to navigate to the portion of the application you need to fill out before Submitting.



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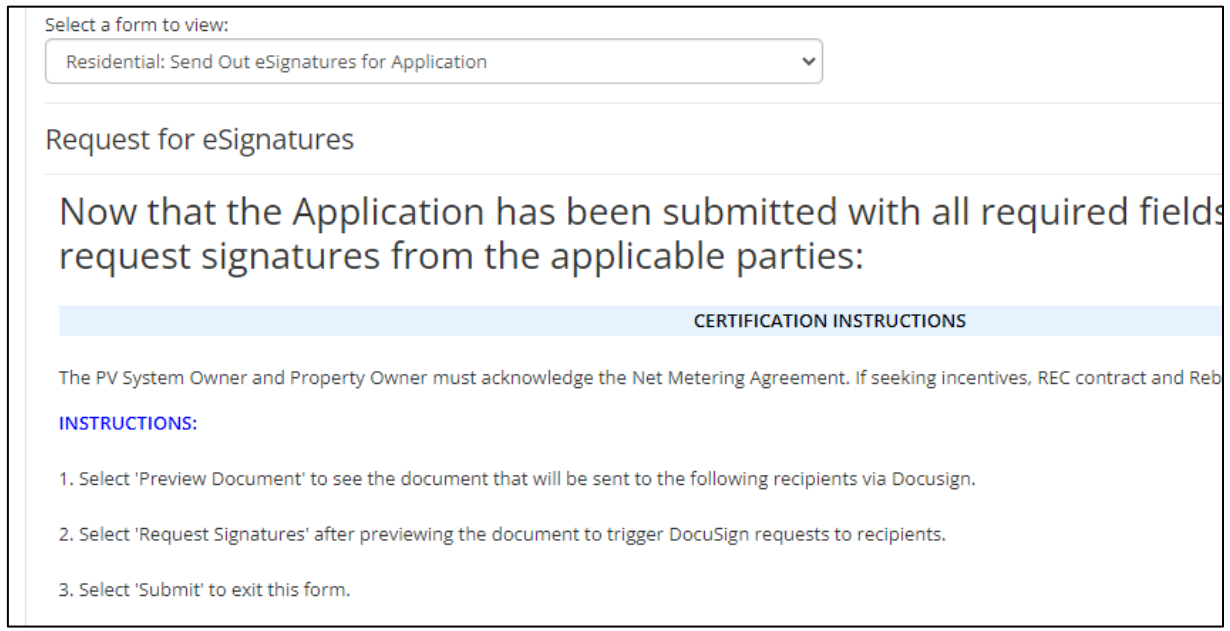
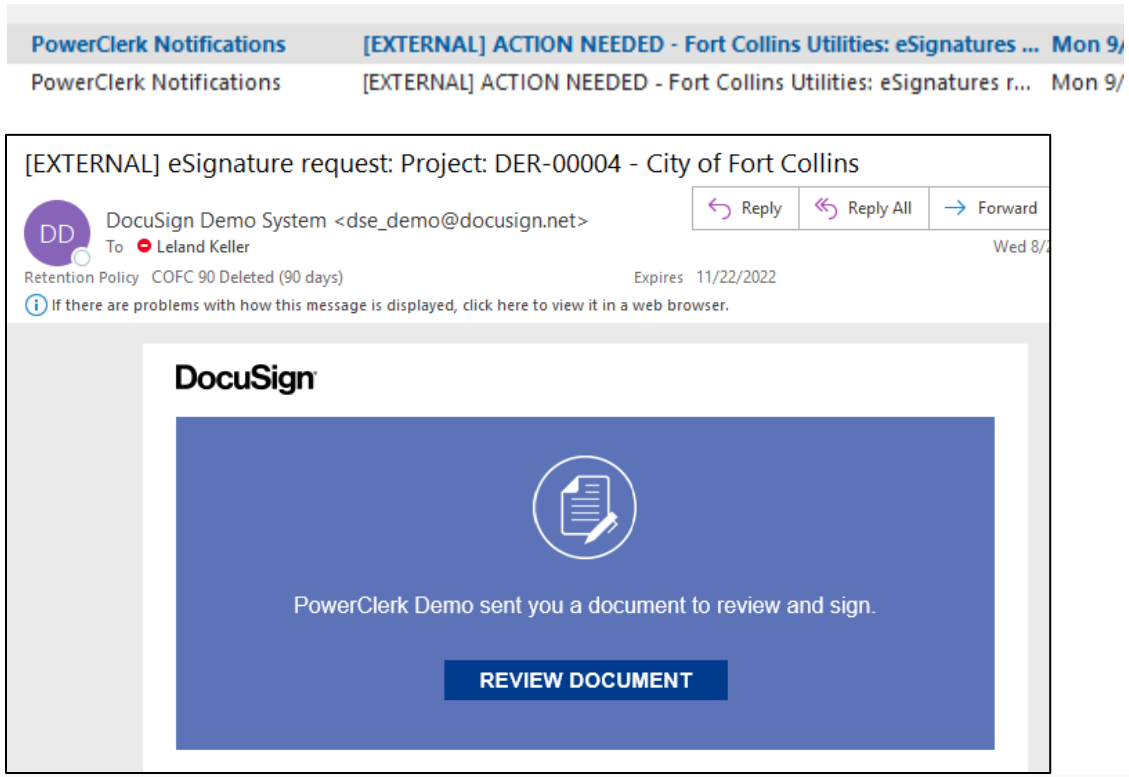
Triggering & Collecting eSignatures

Projects are NOT REVIEWED until eSignatures are collected

Contractor Submits eSignature request in PowerClerk:



Customer Receives eSignature request by email:



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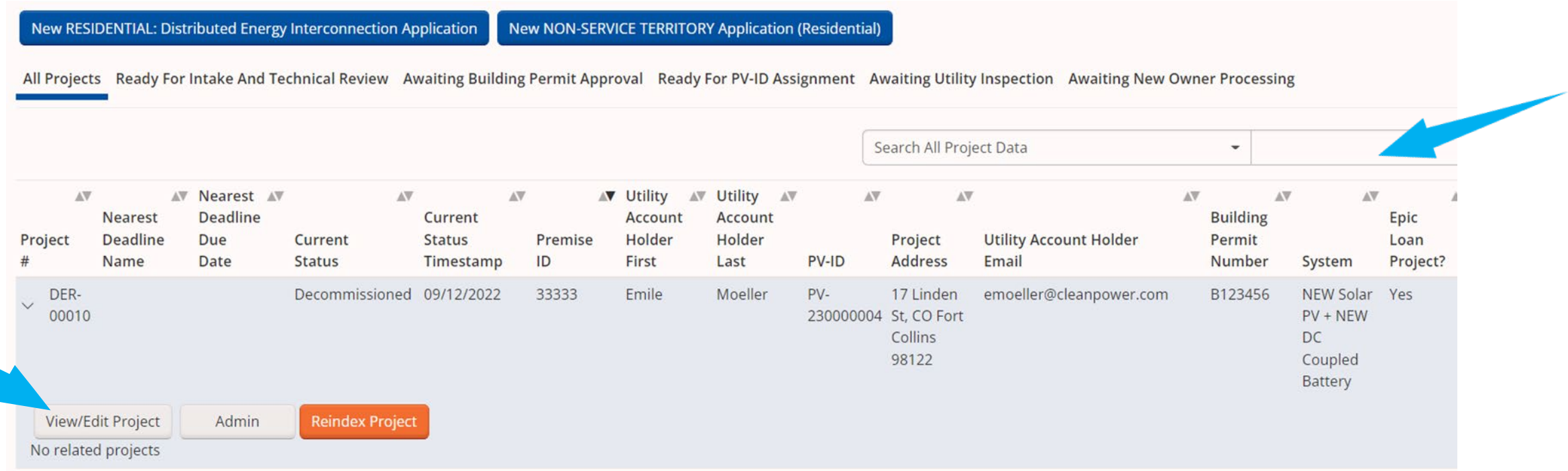
PowerClerk Home / Project Page

Navigating Projects and Settings

PowerClerk Home Screen

Your PowerClerk Home Page will show **every** project that you have started a request for or have submitted.

To view an individual project landing page, **select** the project followed by **"View"/Edit** Project. To Search, type any data into the search bar.



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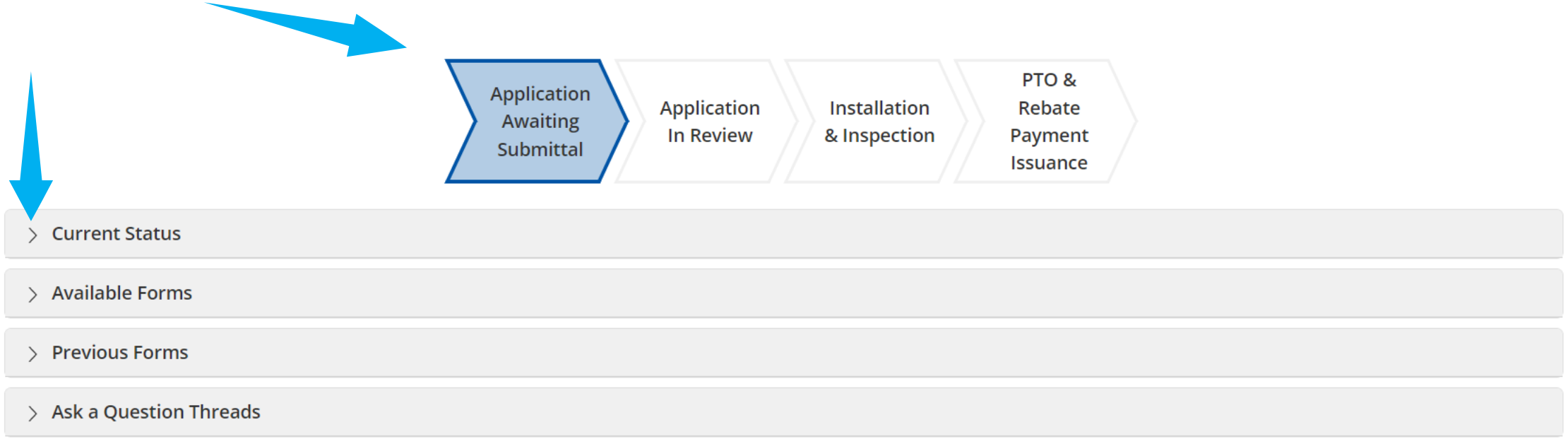
PowerClerk Project Landing Page

The PowerClerk project landing page houses all the information, attachments, communications, and additional forms for your project.

Milestones: The blue highlighted chevron below your project number indicates which stage the project is currently in.

Select the arrow (>) next to each menu to expand the section and reveal important information.



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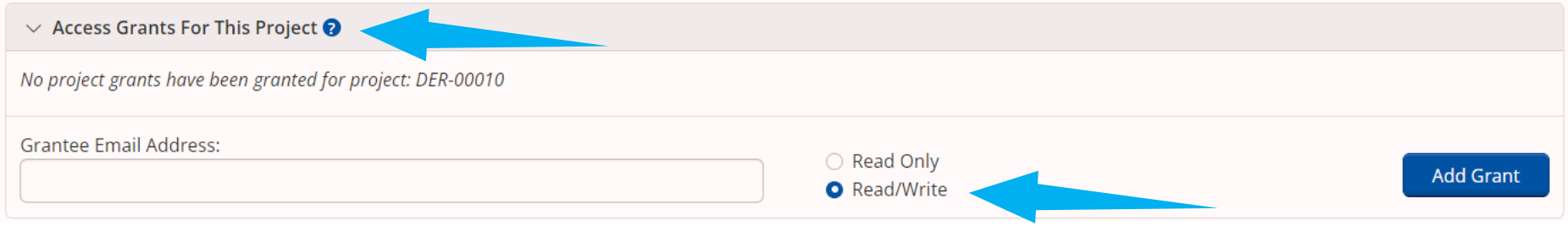
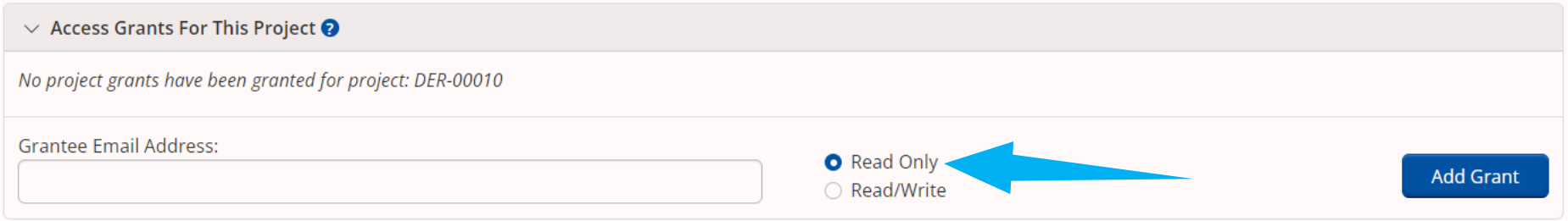
Granting Access Rights for Specific Projects

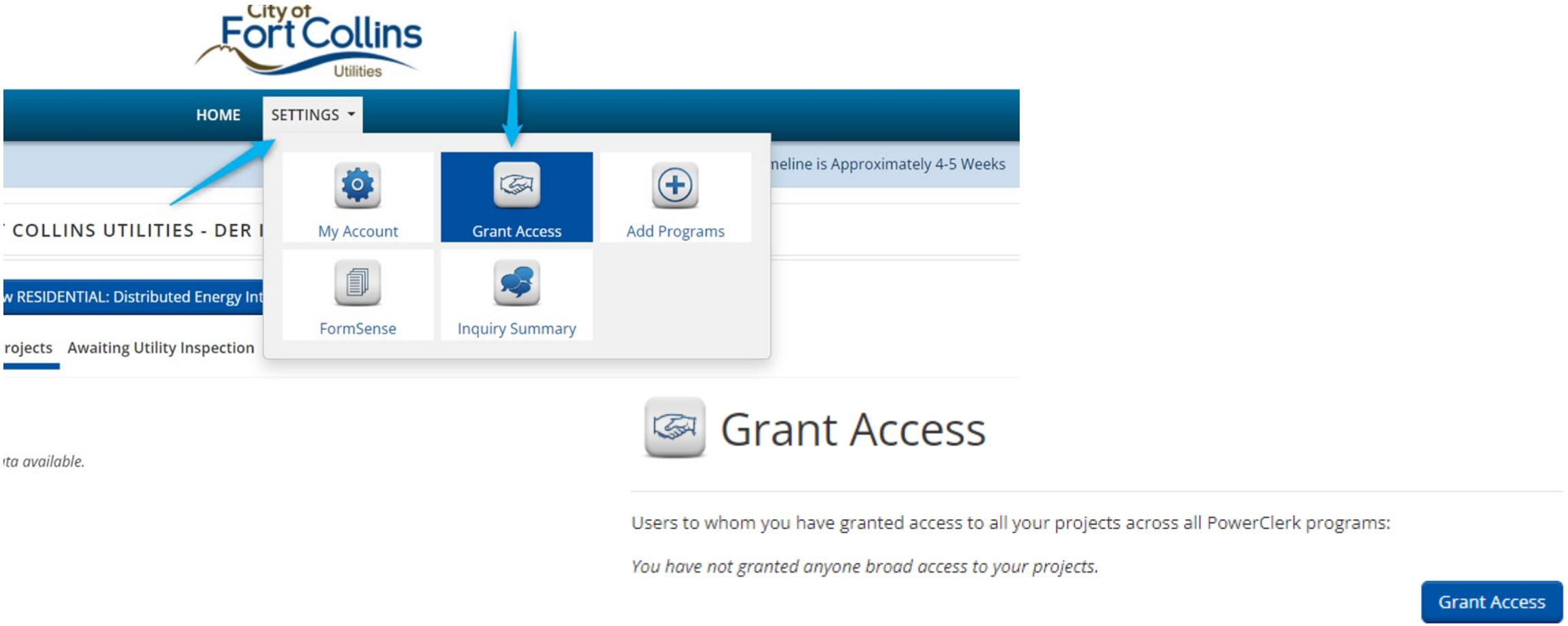
If you would like to collaborate on a project in PowerClerk, grant Read/Write access to a coworker under Access Grants within the View/Edit menu of that project.



If you would like to allow the homeowner or property owner to view the project in PowerClerk, grant them Read-Only access to their project



Granting Access Rights to All Projects



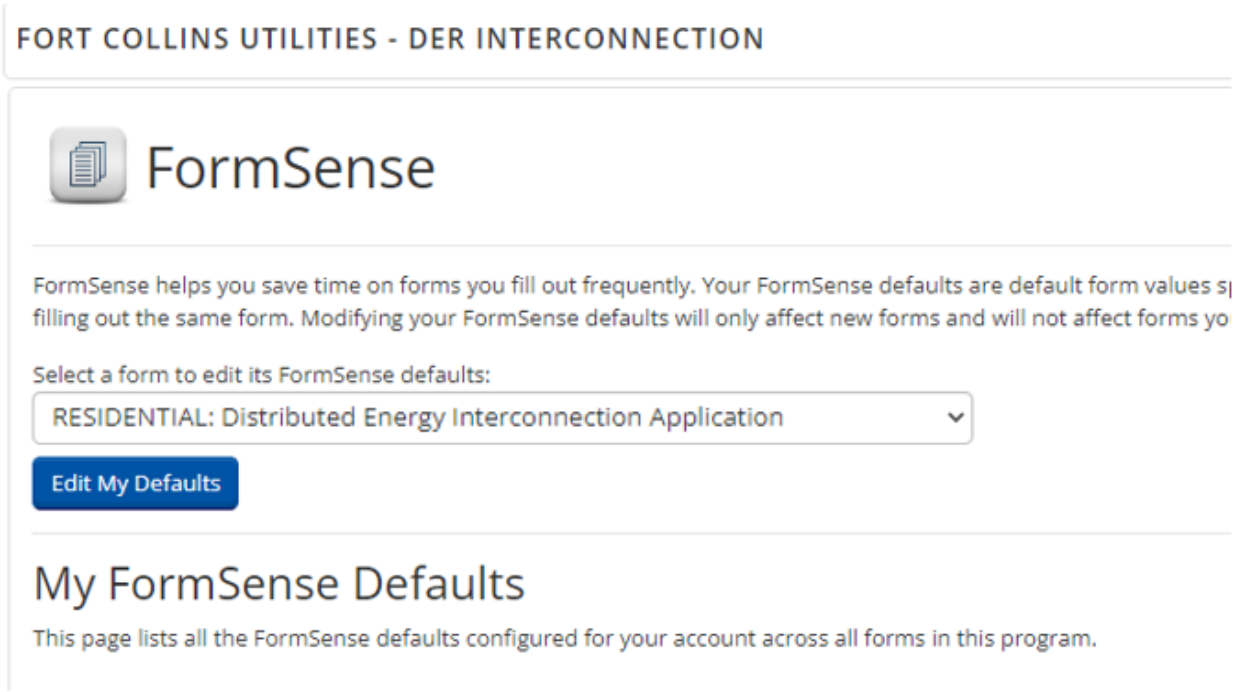
If someone leaves the company and you would like to grant another person on staff access to ALL of their projects, reach out to Fort Collins to complete a **bulk grant access.**

Using FormSense to Prepopulate Application Fields

Handy to reduce entering data in fields that remain consistent

In Settings: FormSense

- Select Edit My Defaults
- Populate fields that will consistently have the same data, such as Contractor:
  - Company name
  - Address
  - Email
  - phone



Available Forms

Additional Project Forms In PowerClerk

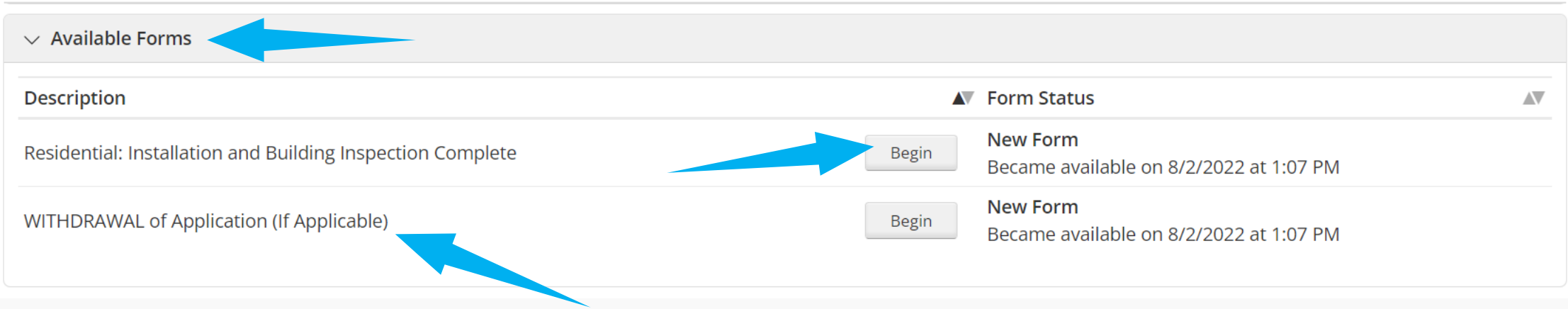
How to find and fill out available project forms

Depending on the status of your application certain forms will become available for the applicant to fill out and submit.

Forms **must be completed and submitted to move your project along its workflow.** Select "Begin" next to your form to complete and submit. Button may display as "Continue" until you complete the form.

Forms designated with "(if applicable)" at the end are optional forms the applicant may fill out at different stages of the project lifecycle.

***Note**: The Applicant may withdraw their request at any time by selecting the "Withdraw Application (if applicable)" and submitting.*



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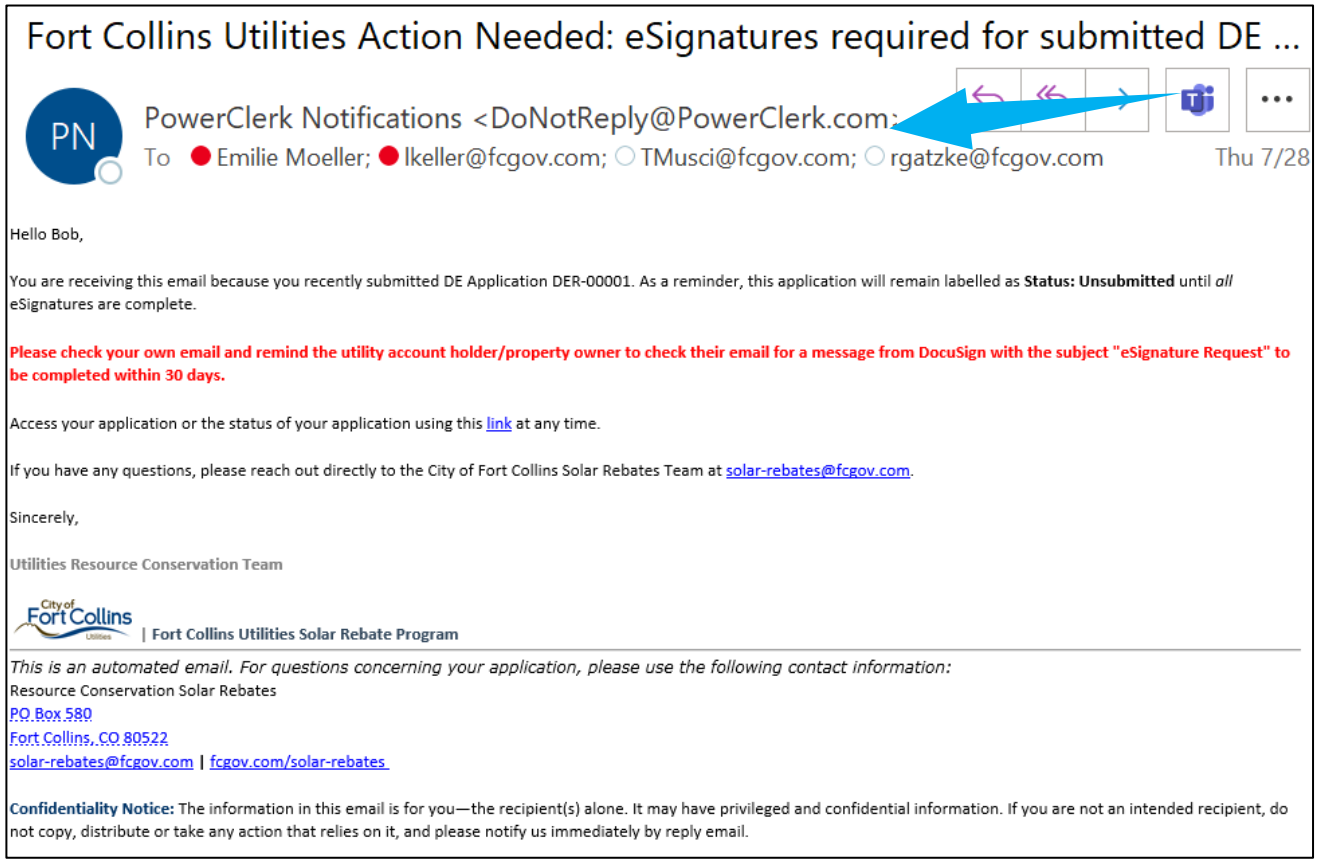
PowerClerk Notification Emails

From time to time you will receive emails from PowerClerk with action items.

Inside these emails will be a **description of the action required** (if any) and a **link** to direct you to PowerClerk.

Please monitor your email inbox for communications sent from PowerClerk. You may need to 'white-list' or add DoNotReply@PowerClerk.com to your address book to ensure that these emails are never filtered out inappropriately



Fort Collins Utilities Action Needed: eSignatures required for submitted DE ...

PN

PowerClerk Notifications <DoNotReply@PowerClerk.com>

To Emilie Moeller; lkeller@fcgov.com; TMusci@fcgov.com; rgatzke@fcgov.com Thu 7/28

Hello Bob,

You are receiving this email because you recently submitted DE Application DER-00001. As a reminder, this application will remain labelled as **Status: Unsubmitted** until *all* eSignatures are complete.

Please check your own email and remind the utility account holder/property owner to check their email for a message from DocuSign with the subject "eSignature Request" to be completed within 30 days.

Access your application or the status of your application using this link at any time.

If you have any questions, please reach out directly to the City of Fort Collins Solar Rebates Team at solar-rebates@fcgov.com.

Sincerely,

Utilities Resource Conservation Team

City of Fort Collins Utilities | **Fort Collins Utilities Solar Rebate Program**

This is an automated email. For questions concerning your application, please use the following contact information:

Resource Conservation Solar Rebates
PO Box 580
Fort Collins, CO 80522
solar-rebates@fcgov.com | fcgov.com/solar-rebates

Confidentiality Notice: The information in this email is for you—the recipient(s) alone. It may have privileged and confidential information. If you are not an intended recipient, do not copy, distribute or take any action that relies on it, and please notify us immediately by reply email.

Forms to Advance Applications

Status	Available Form
Unsubmitted	Residential: Distributed Energy Application
Pending eSignatures	Residential: Send Out eSignatures for Application
Installation and Final Building Inspection In Progress	Residential: Notify Utilities of Completed Installation and Building Inspection
Anytime before PTO	WITHDRAW Application
Awaiting Utility Building Permit Approval	Residential: Submit New Building Permit (if applicable)
• Corrections Required for Utility Inspection (Residential) • System Online, Inspection Conditionally Passed (Residential)	• Photo Upload (if applicable) • Residential: Request New Utility Inspection (If Applicable)

Need Help? "Ask A Question"

How to submit questions to Fort Collins Utilities

How to Submit a Question to Fort Collins Utilities

Select the **"Ask a Question"** button located on the top right of the PowerClerk screen to fill out and submit a project related question to Fort Collins Utilities.

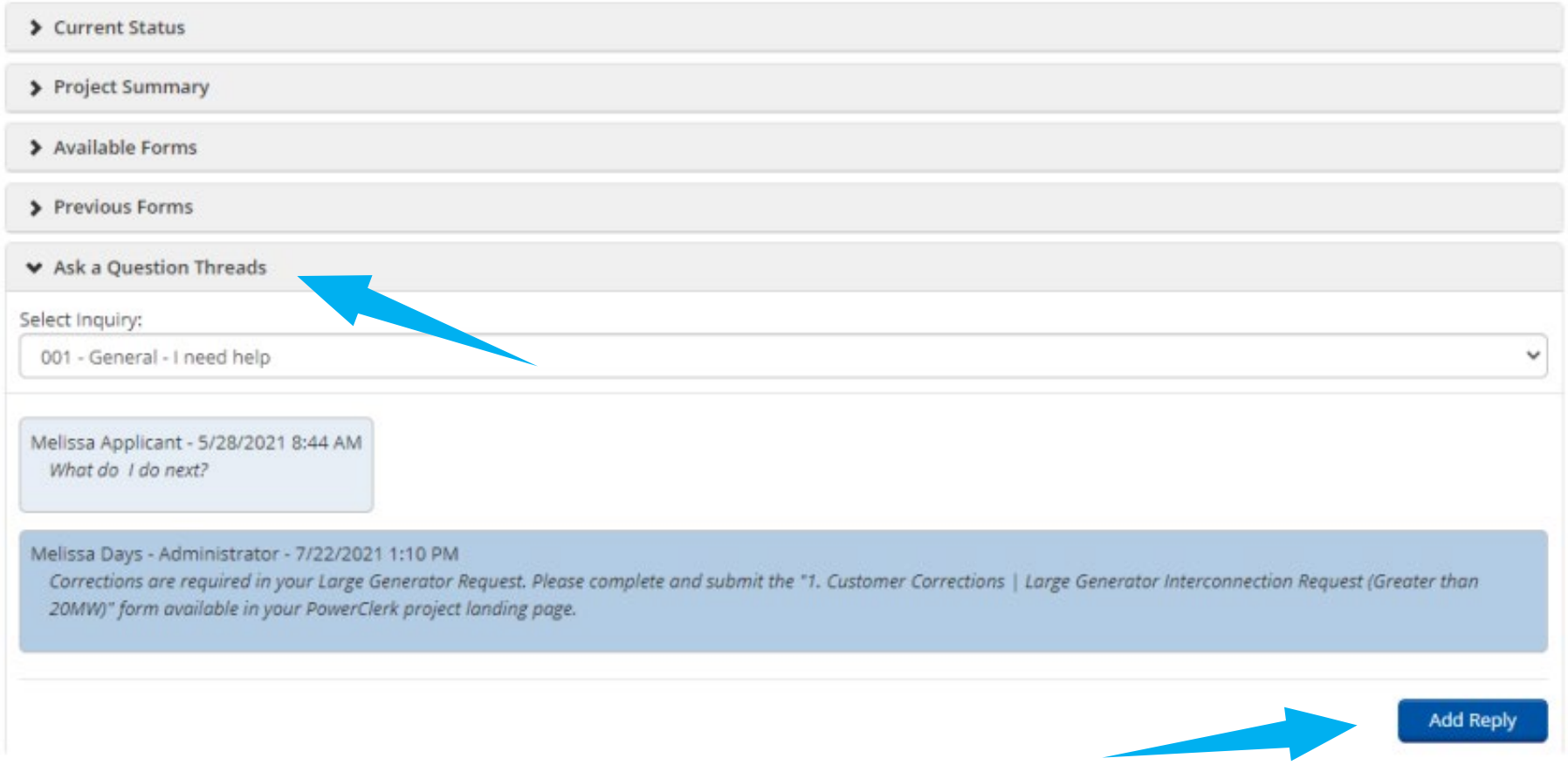
Once Fort Collins Utilities has responded to your question you will receive an email from PowerClerk directing you to navigate to the View/Edit page of your project to read the response.

Submit questions **not related to a numbered DER application** by email: solar-rebates@fcgov.com.

How to View Fort Collins Utilities Responses

You will be able to review Fort Collins Utilities' response under the "Ask a Question" thread within your project **'View/Edit'** page.

You may respond to Fort Collins Utilities directly from PowerClerk by selecting **"Add Reply"**.



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