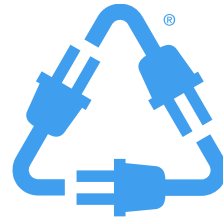


PowerClerk Applicant Training Guide

September 2022



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



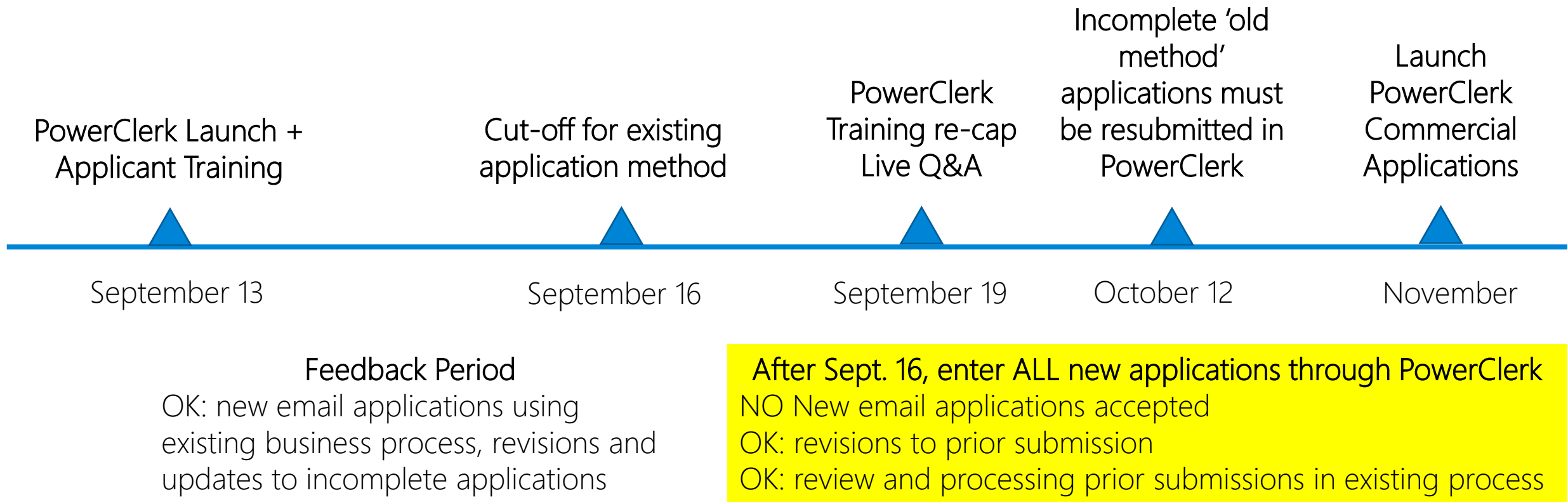
PowerClerk is the online application portal for Fort Collins Utilities Distributed Energy Interconnection

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

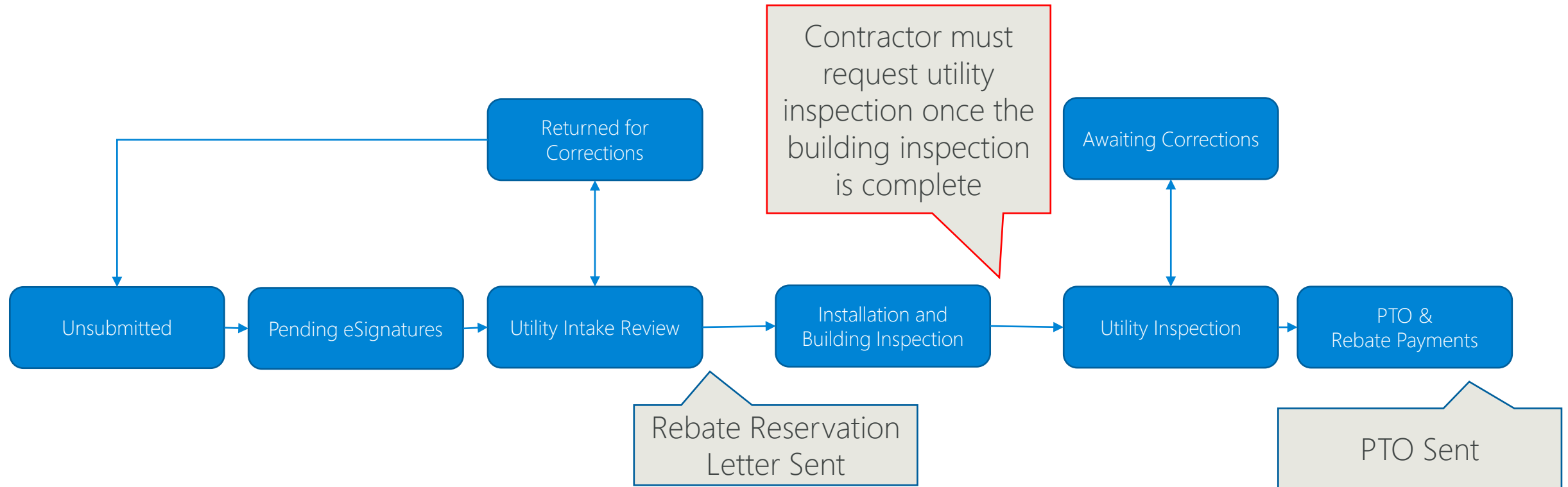


PowerClerk Rollout Schedule



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

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

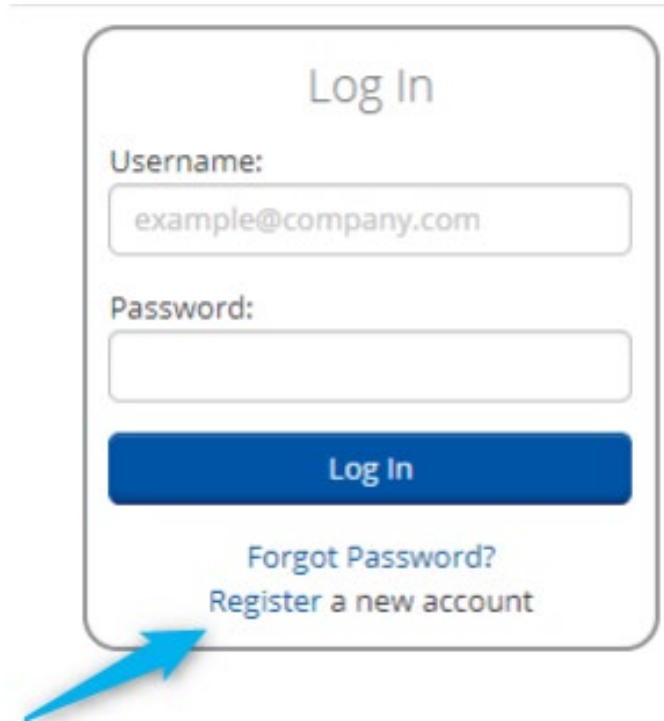
Step Two

- 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.



Log In

Username:

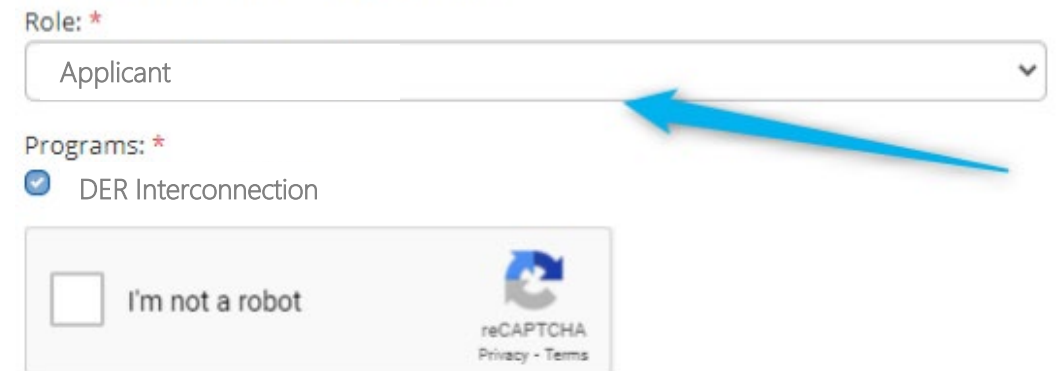
Password:

Log In

[Forgot Password?](#)
[Register a new account](#)

A blue arrow points from the bottom of the Log In form to the "Register a new account" link.

Roles And Programs



Role: *

Programs: *

☒ DER Interconnection

☐ I'm not a robot

reCAPTCHA
Privacy - Terms

A blue arrow points from the right side of the form to the "Applicant" role selection dropdown.

Already have a PowerClerk Account?

Step One

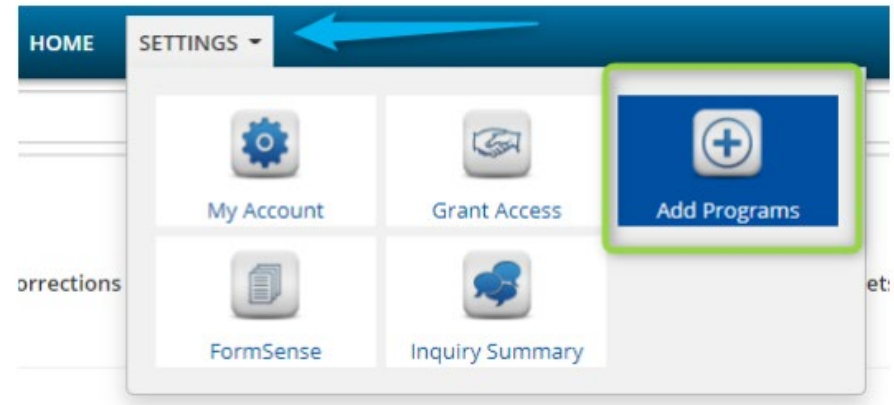
- Log Into your PowerClerk account. Any PowerClerk account will do.

Step Two

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

Step Three

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



Program to Add

Once you've added a new program, visit your home page and it will appear in your program list.

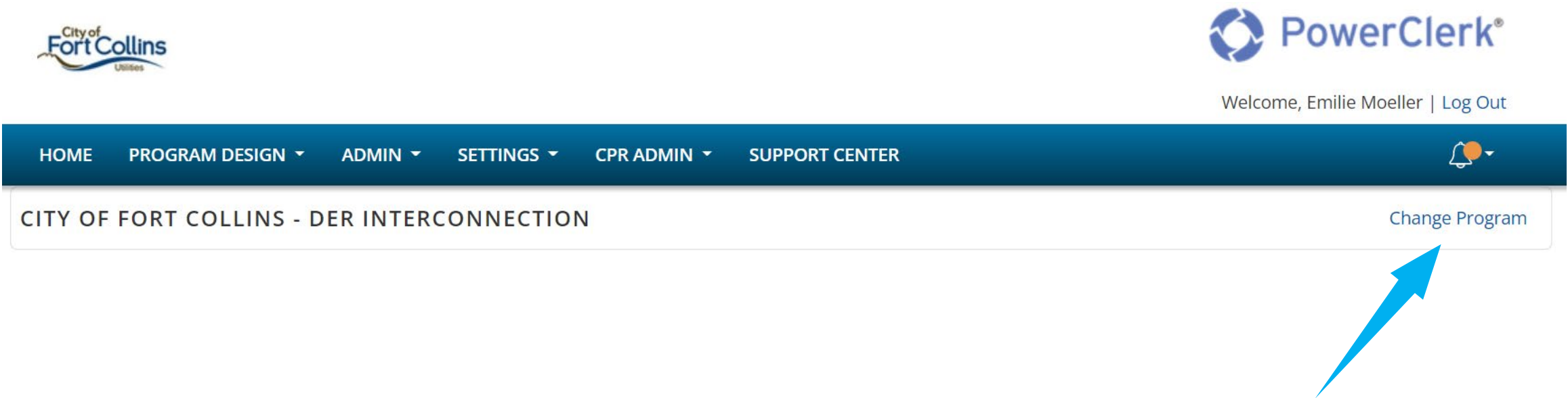
Agency:

Please select an agency...



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.

CITY OF FORT COLLINS - DER INTERCONNECTION - TEST

[Change Program](#)

New RESIDENTIAL: Distributed Energy Interconnection Application

New COMMERCIAL Distributed Energy Interconnection Application

All Projects



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.

Fort Collins Utilities Distributed Energy Interconnection Application

Use this interconnection application for all distributed energy projects including solar PV, battery storage, and other generation.

1	2	3	4	5
Application Type Selection	Contact Information	System Information	Required Documentation	Certifications

WELCOME

Back

Next

Application Submission

PLEASE REMEMBER: After submitting this application you must request eSignatures from additional parties by following the instructions in your confirmation email.

Fort Collins Utilities will *not* review applications until all eSignatures have been collected.

Back

Submit

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.

Unable to Submit Form

Please fix the errors below and try again.

Missing Required Fields:

- What technology are you submitting this interconnection application for? - [Page 1](#)
- Is there an existing storage component/battery at this site? - [Page 1](#)
- Is there existing solar PV at this site? - [Page 1](#)
- Does the proposed system include an EV Charger? - [Page 1](#)
- What is the property type? - [Page 1](#)

Triggering & Collecting eSignatures

Projects are NOT REVIEWED until eSignatures are collected

Contractor Submits eSignature request in PowerClerk:

Select a form to view:

Residential: Send Out eSignatures for Application

Request for eSignatures

Now that the Application has been submitted with all required fields request signatures from the applicable parties:

CERTIFICATION INSTRUCTIONS

The PV System Owner and Property Owner must acknowledge the Net Metering Agreement. If seeking incentives, REC contract and Reb

INSTRUCTIONS:

1. Select 'Preview Document' to see the document that will be sent to the following recipients via DocuSign.
2. Select 'Request Signatures' after previewing the document to trigger DocuSign requests to recipients.
3. Select 'Submit' to exit this form.

Customer Receives eSignature request by email:

PowerClerk Notifications

[EXTERNAL] ACTION NEEDED - Fort Collins Utilities: eSignatures ... Mon 9/

PowerClerk Notifications

[EXTERNAL] ACTION NEEDED - Fort Collins Utilities: eSignatures r... Mon 9/

[EXTERNAL] eSignature request: Project: DER-00004 - City of Fort Collins

DD DocuSign Demo System <dse_demo@docusign.net>

To Leland Keller

Retention Policy COFC 90 Deleted (90 days) Expires 11/22/2022


If there are problems with how this message is displayed, click here to view it in a web browser.

Reply

Reply All


Forward

DocuSign



PowerClerk Demo sent you a document to review and sign.

REVIEW DOCUMENT

 PowerClerk®

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.

New RESIDENTIAL: Distributed Energy Interconnection ApplicationNew NON-SERVICE TERRITORY Application (Residential)

All ProjectsReady For Intake And Technical ReviewAwaiting Building Permit ApprovalReady For PV-ID AssignmentAwaiting Utility InspectionAwaiting New Owner Processing

Search All Project Data

Project #	Nearest Deadline Name	Nearest Deadline Due Date	Current Status	Current Status Timestamp	Premise ID	Utility Account Holder First	Utility Account Holder Last	PV-ID	Project Address	Utility Account Holder Email	Building Permit Number	System	Epic Loan Project?
DER-00010			Decommissioned	09/12/2022	33333	Emile	Moeller	PV-230000004	17 Linden St, CO Fort Collins 98122	emoeller@cleanpower.com	B123456	NEW Solar PV + NEW DC Coupled Battery	Yes

View/Edit Project

Admin

Reindex Project

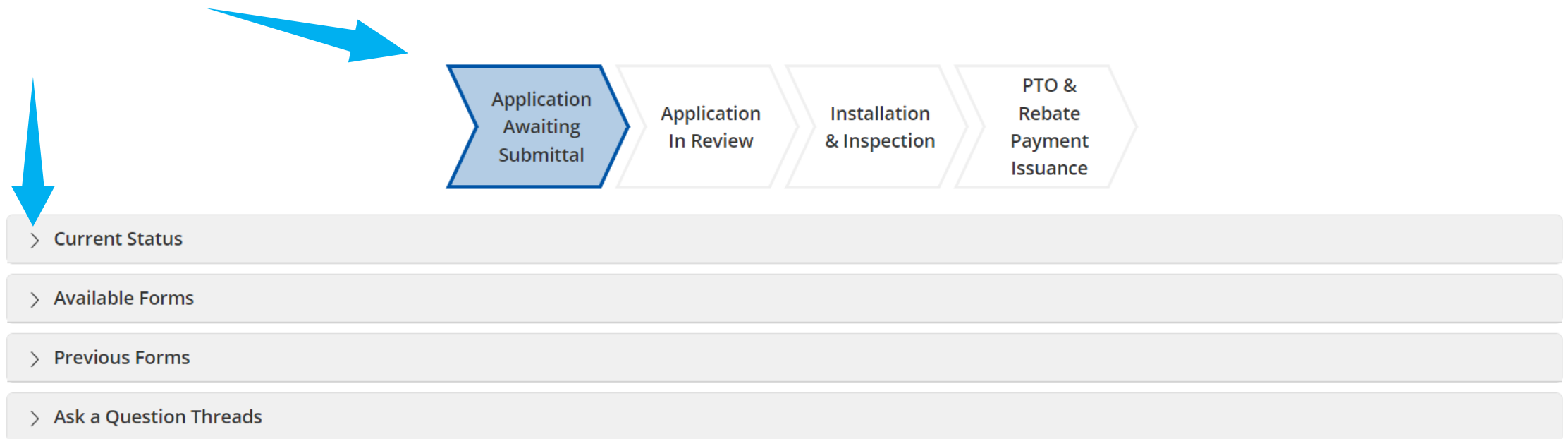
No related projects

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.



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.



▼ Access Grants For This Project ?

No project grants have been granted for project: DER-00010

Grantee Email Address:

☐ Read Only
☒ Read/Write

[Add Grant](#)

A blue arrow points to the 'Access Grants For This Project' header, and another blue arrow points to the 'Read/Write' radio button.

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



▼ Access Grants For This Project ?

No project grants have been granted for project: DER-00010

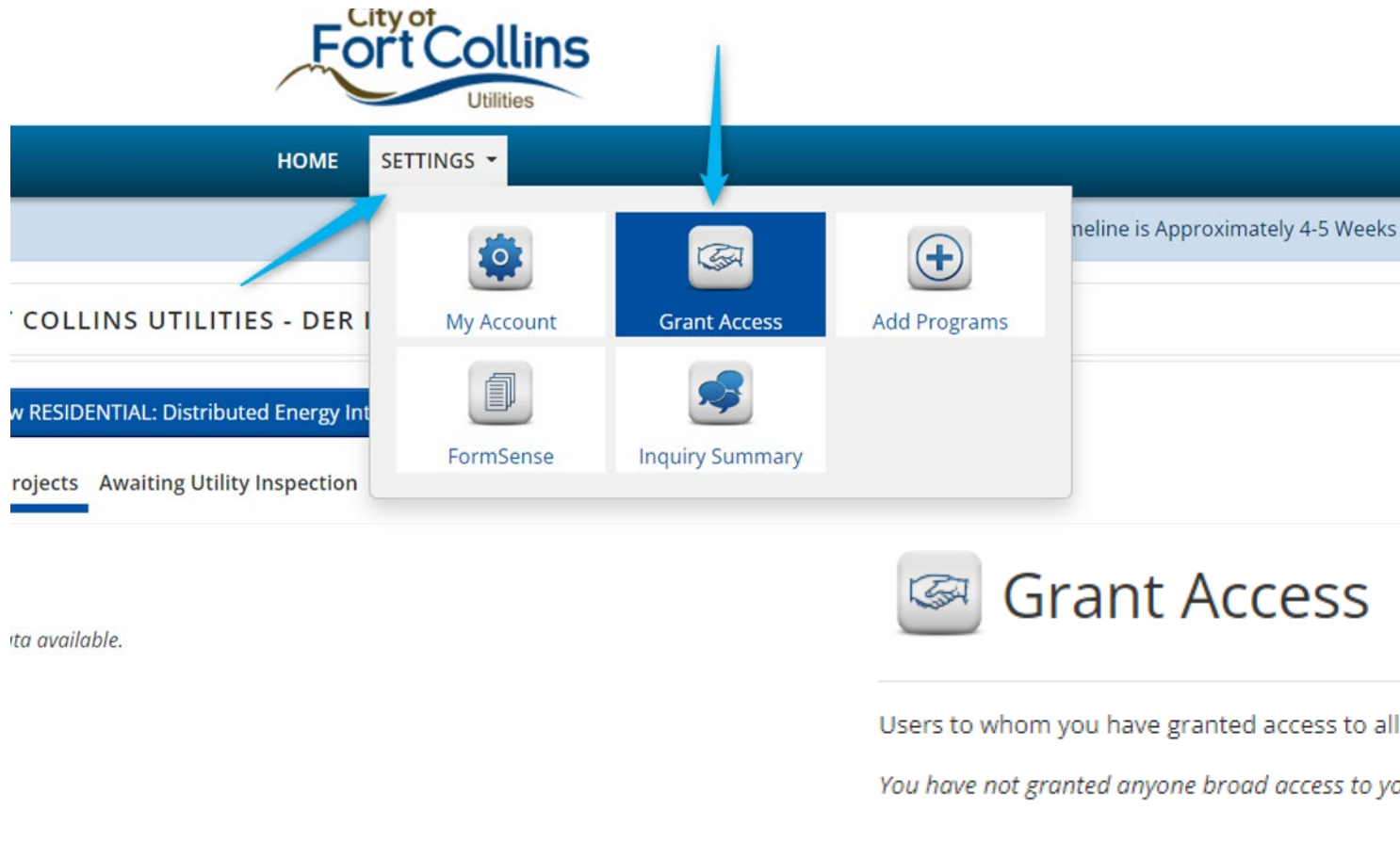
Grantee Email Address:

☒ Read Only
☐ Read/Write

[Add Grant](#)

A blue arrow points to the 'Read Only' radio button.

Granting Access Rights to All Projects



The screenshot shows the City of Fort Collins Utilities PowerClerk interface. At the top, the logo for City of Fort Collins Utilities is visible. Below it, a navigation bar contains 'HOME' and 'SETTINGS'. A blue arrow points to the 'SETTINGS' dropdown menu, which is open, showing options: 'My Account', 'Grant Access' (highlighted with a blue background), 'Add Programs', 'FormSense', and 'Inquiry Summary'. Another blue arrow points to the 'Grant Access' option. Below the settings menu, the text 'Grant Access' is displayed with a handshake icon. Further down, the text reads: 'Users to whom you have granted access to all your projects across all PowerClerk programs:' followed by 'You have not granted anyone broad access to your projects.' A blue button labeled 'Grant Access' is located at the bottom right of the interface.

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

FORT COLLINS UTILITIES - DER INTERCONNECTION



FormSense

FormSense helps you save time on forms you fill out frequently. Your FormSense defaults are default form values saved for you to use when filling out the same form. Modifying your FormSense defaults will only affect new forms and will not affect forms you have already submitted.

Select a form to edit its FormSense defaults:

RESIDENTIAL: Distributed Energy Interconnection Application



Edit My Defaults

My FormSense Defaults

This page lists all the FormSense defaults configured for your account across all forms in this program.

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.*

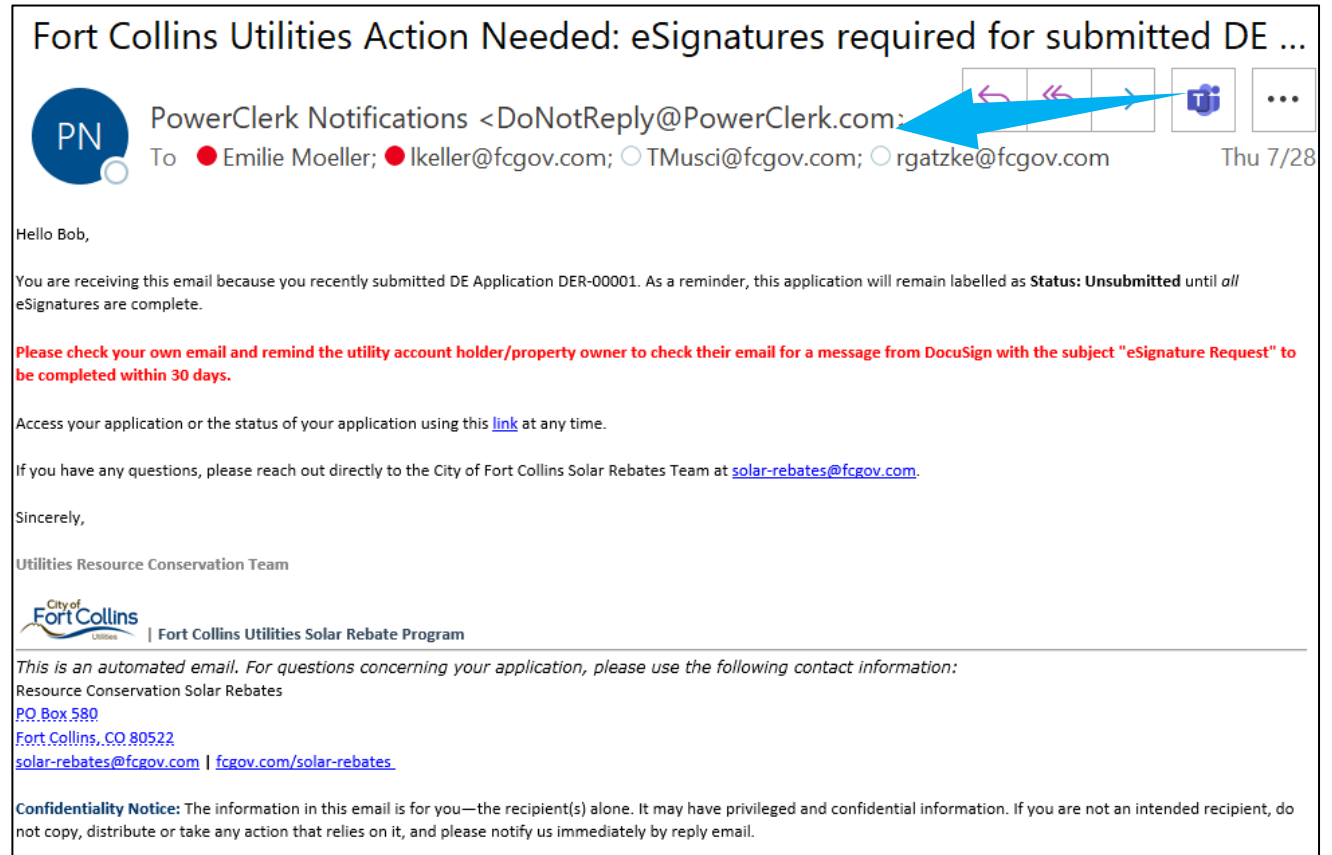
▼ Available Forms	
Description	▲▼ Form Status ▲▼
Residential: Installation and Building Inspection Complete	<div>Begin</div> <div>New Form Became available on 8/2/2022 at 1:07 PM</div>
WITHDRAWAL of Application (If Applicable)	<div>Begin</div> <div>New Form Became available on 8/2/2022 at 1:07 PM</div>

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



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)
<ul style="list-style-type: none">• Corrections Required for Utility Inspection (Residential)• System Online, Inspection Conditionally Passed (Residential)	<ul style="list-style-type: none">• 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.

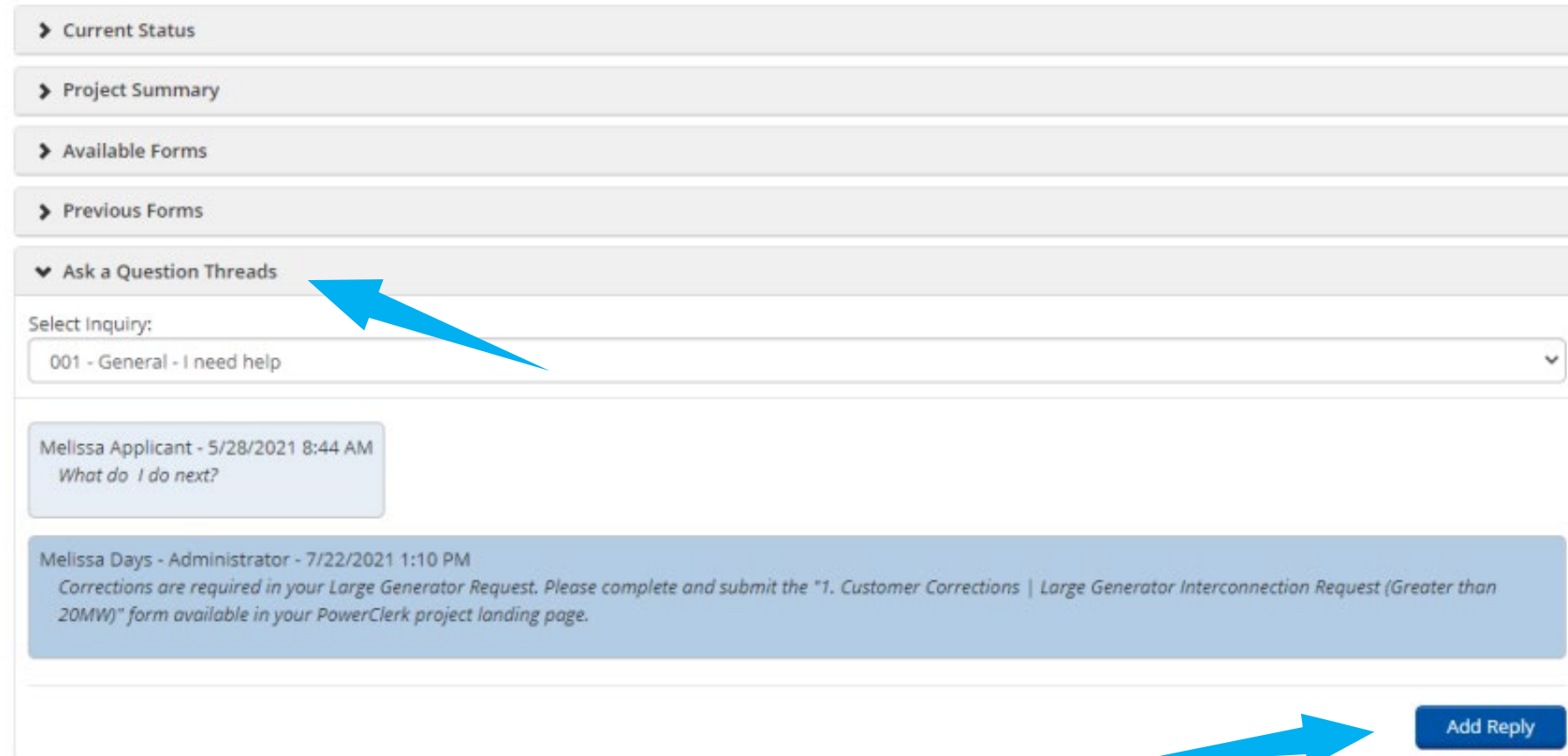
Submit questions **not related to a numbered DER application** by email: solar-rebates@fcgov.com.



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".



Current Status

Project Summary

Available Forms

Previous Forms

▼ Ask a Question Threads

Select Inquiry:

001 - General - I need help

Melissa Applicant - 5/28/2021 8:44 AM
What do I do next?

Melissa Days - Administrator - 7/22/2021 1:10 PM
Corrections are required in your Large Generator Request. Please complete and submit the "1. Customer Corrections | Large Generator Interconnection Request (Greater than 20MW)" form available in your PowerClerk project landing page.

Add Reply