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CONNECTICUT GREEN BANK

Residential Solar Investment Program

PowerClerk 2 Process Guide

August 15, 2017

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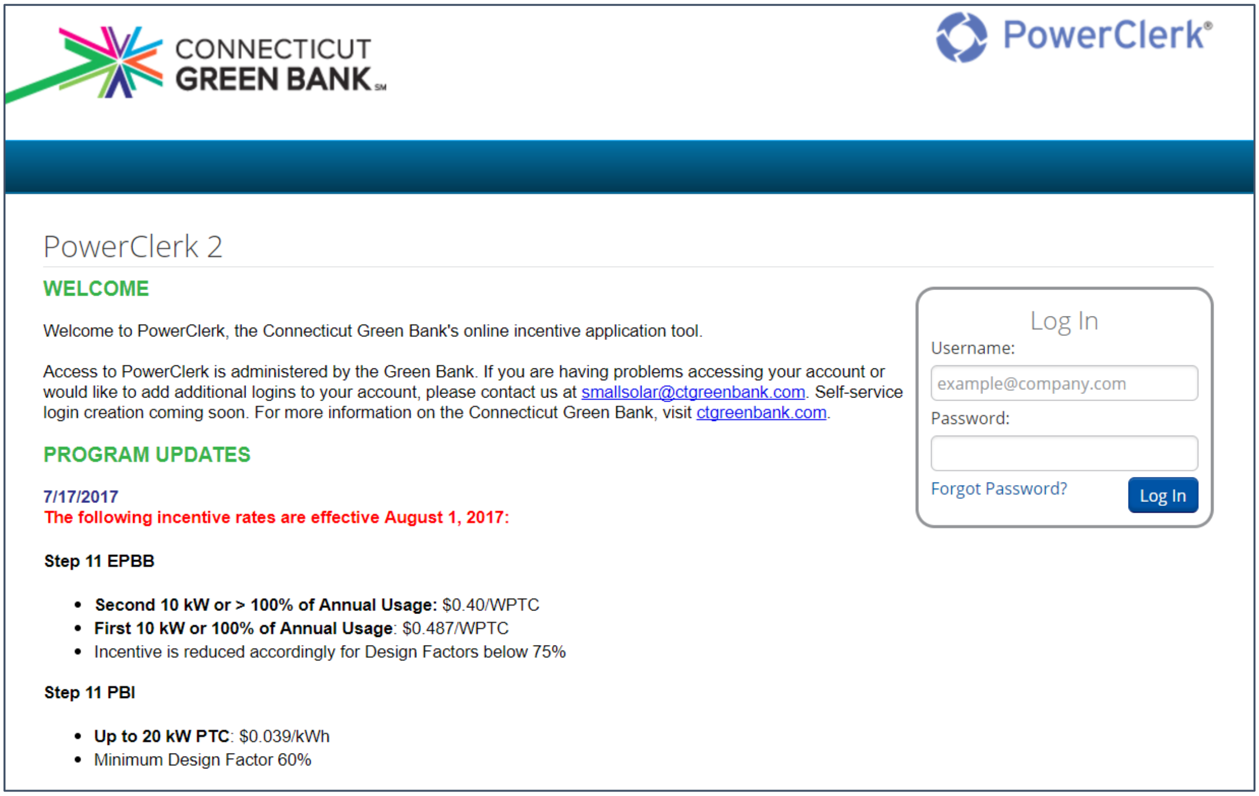
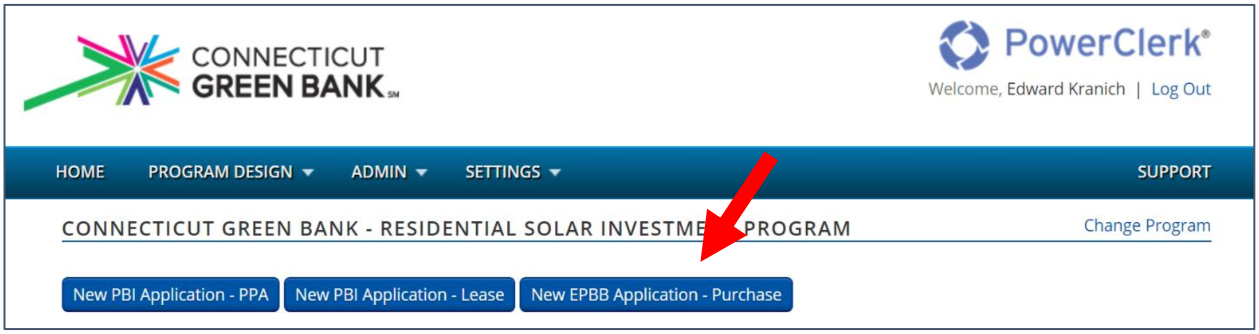
Login

1. Visit cgbrsip.powerclerk.com. Your login from PowerClerk 1 will work in PowerClerk 2. Follow the instructions on the login screen to create a new login.

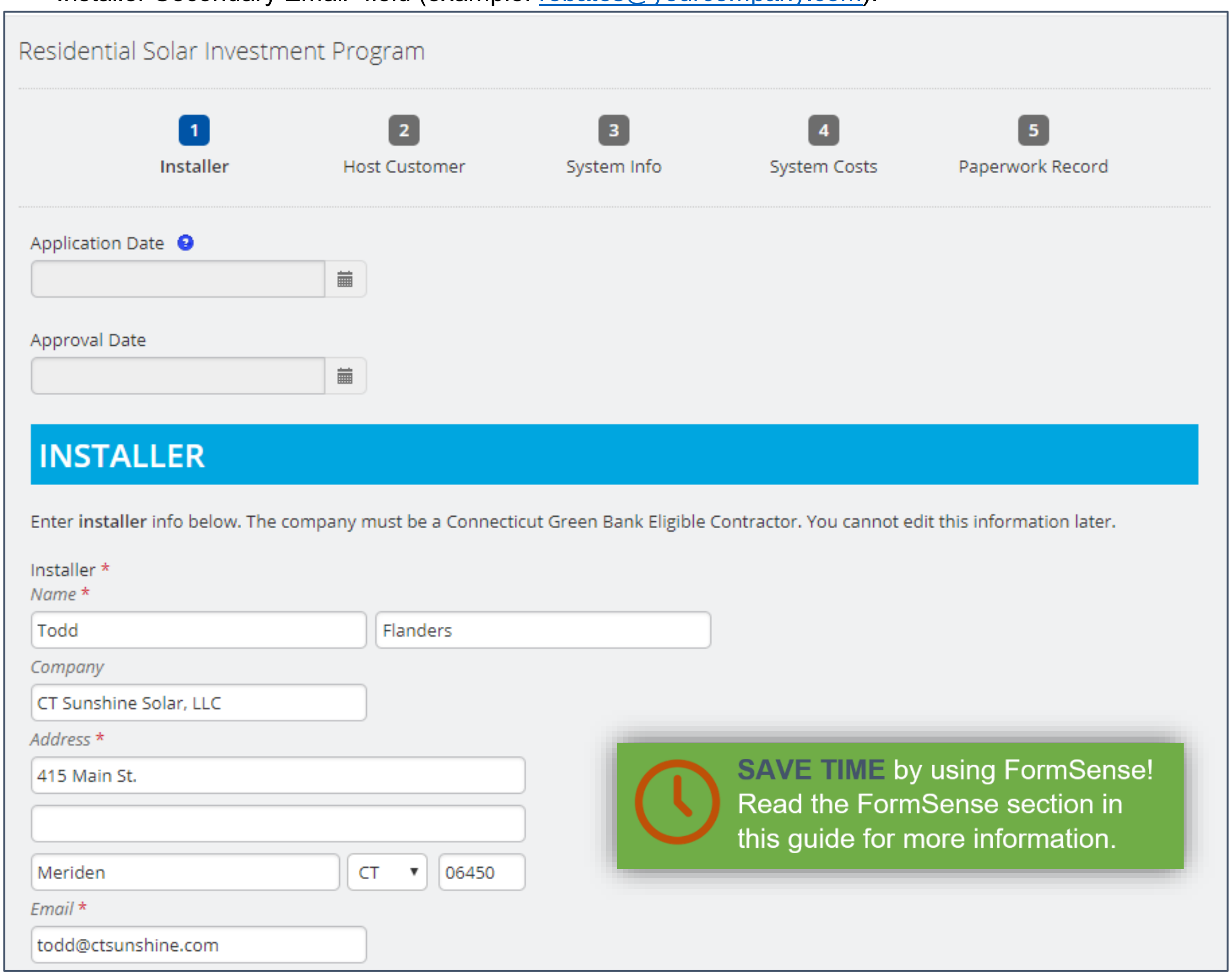


Application – EPBB

1. On the PowerClerk home screen, click “New EPBB Application – Purchase”

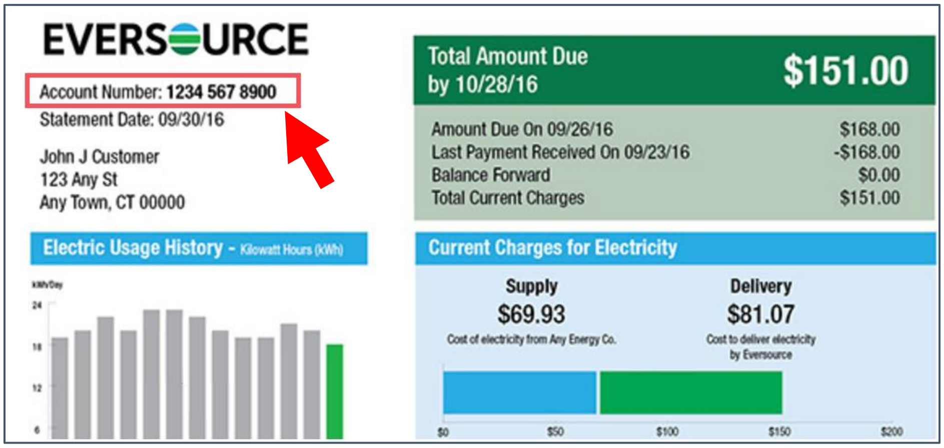


2. **Enter Contractor information**. This is the Eligible Contractor with whom the customer has signed a contract. Do not enter subcontractor information in this field. Enter your information (including name, company and email address) on this screen. We recommend entering a general email address in the “Installer Secondary Email” field (example: rebates@yourcompany.com).

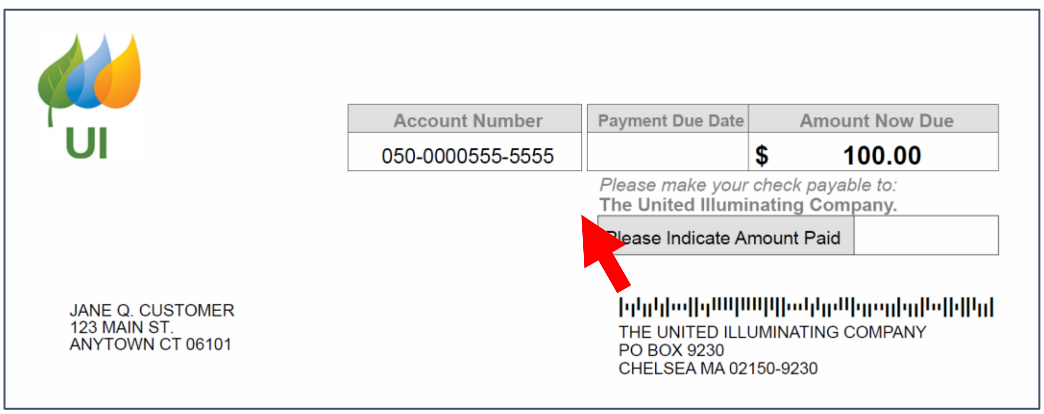


3. Enter Host Customer and site info. The Utility Account Number should match the electric bill **exactly**, including dashes and spaces:

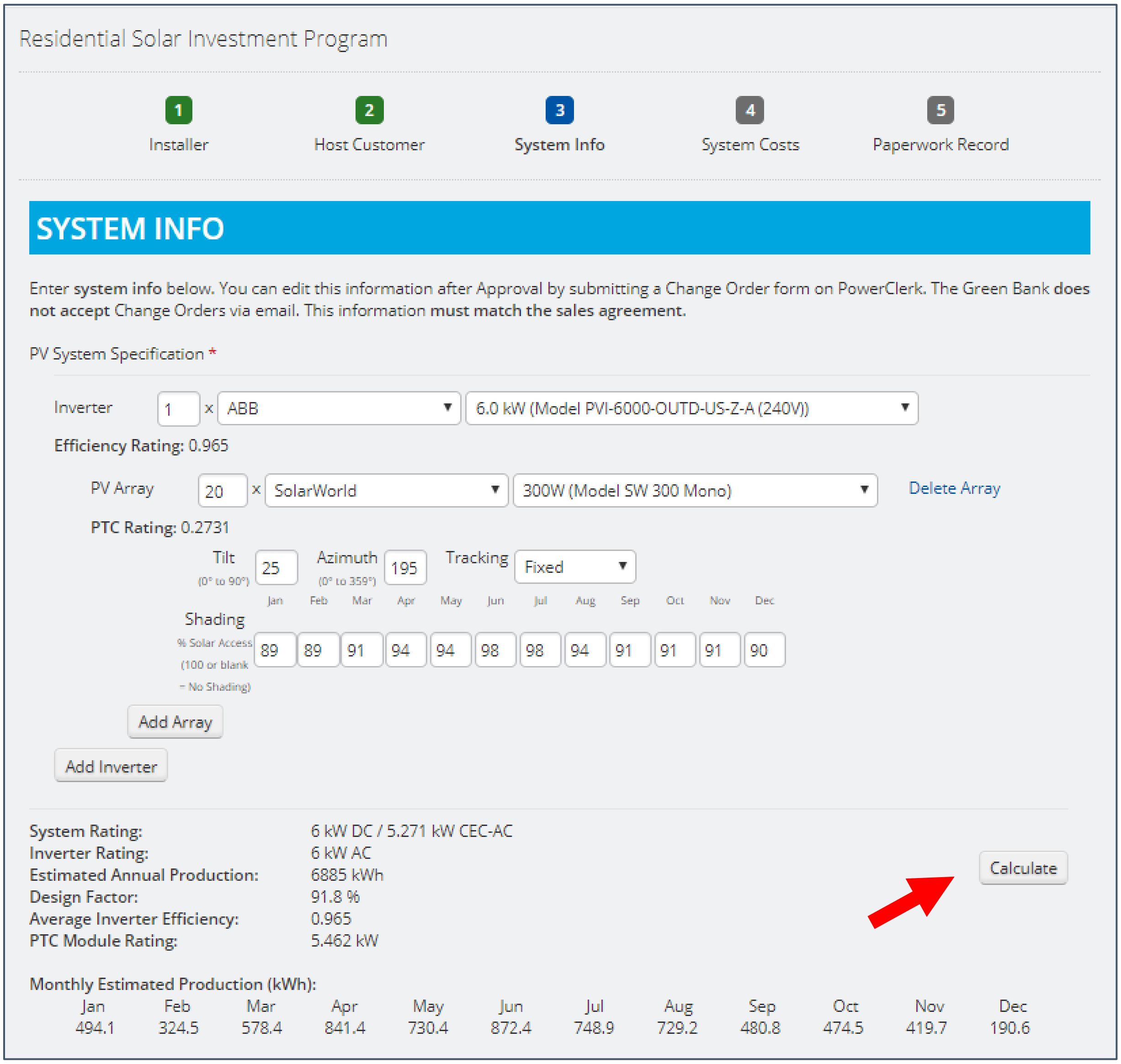
Eversource:



UI:



4. Enter the System Info. This must match the information on your contract and site design exactly, including the tilt, azimuth and shade. The shade should be entered as the **monthly solar access *per array***. If you have multiple arrays, you will need multiple shade reports with unique monthly solar access readings. Click "calculate" to find the Design Factor and


Residential Solar Investment Program

1 Installer | 2 Host Customer | 3 System Info | 4 System Costs | 5 Paperwork Record

SYSTEM INFO

Enter **system info** below. You can edit this information after Approval by submitting a Change Order form on PowerClerk. The Green Bank **does not accept** Change Orders via email. This information **must match the sales agreement.**

PV System Specification *

Inverter 1 x ABB 6.0 kW (Model PVI-6000-OUTD-US-Z-A (240V))

Efficiency Rating: 0.965

PV Array 20 x SolarWorld 300W (Model SW 300 Mono) Delete Array

PTC Rating: 0.2731

Tilt (0° to 90°) 25 Azimuth (0° to 359°) 195 Tracking Fixed

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Shading % Solar Access (100 or blank = No Shading)	89	89	91	94	94	98	98	94	91	91	91	90

Add Array

Add Inverter

System Rating:	6 kW DC / 5.271 kW CEC-AC
Inverter Rating:	6 kW AC
Estimated Annual Production:	6885 kWh
Design Factor:	91.8 %
Average Inverter Efficiency:	0.965
PTC Module Rating:	5.462 kW

Calculate

Monthly Estimated Production (kWh):

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
494.1	324.5	578.4	841.4	730.4	872.4	748.9	729.2	480.8	474.5	419.7	190.6

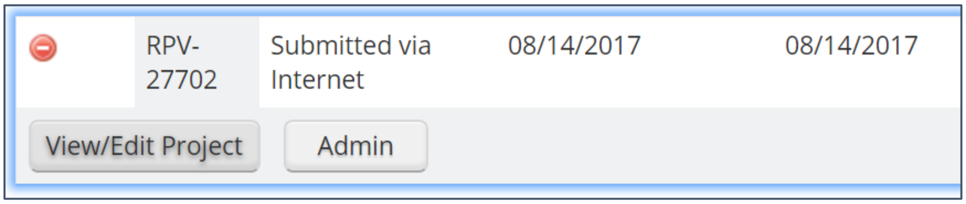
5. Enter the system costs and system financing information.

6. Upload the required paperwork, and if applicable, the optional paperwork. Energy Efficiency Information uploaded at application stage will satisfy that requirement for project completion.

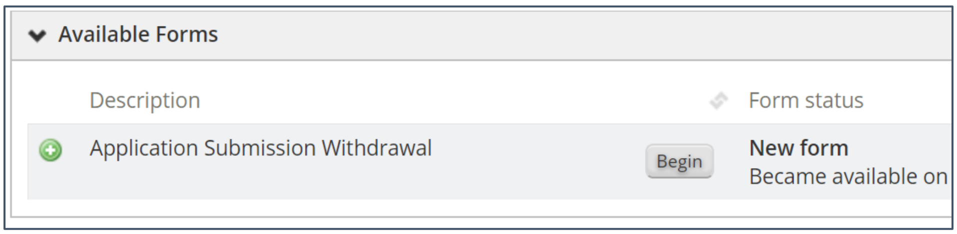
7. Click "submit" to change the status to "Submitted Via Internet" and receive your RPV number.

Application Withdrawal – EPBB or PBI

1. If you made a mistake on your application, click “View / Edit” on the application on the home screen.



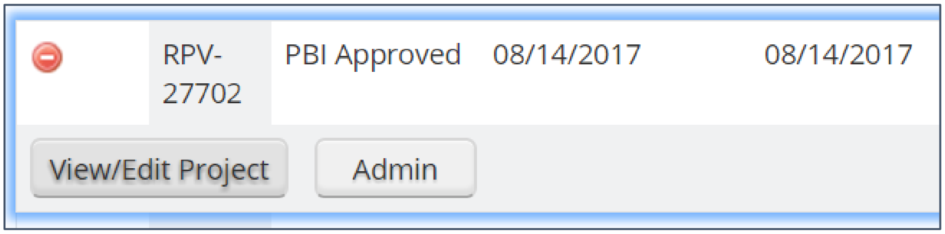
2. Find the “Application Withdrawal” form among the list of available forms and click Begin.



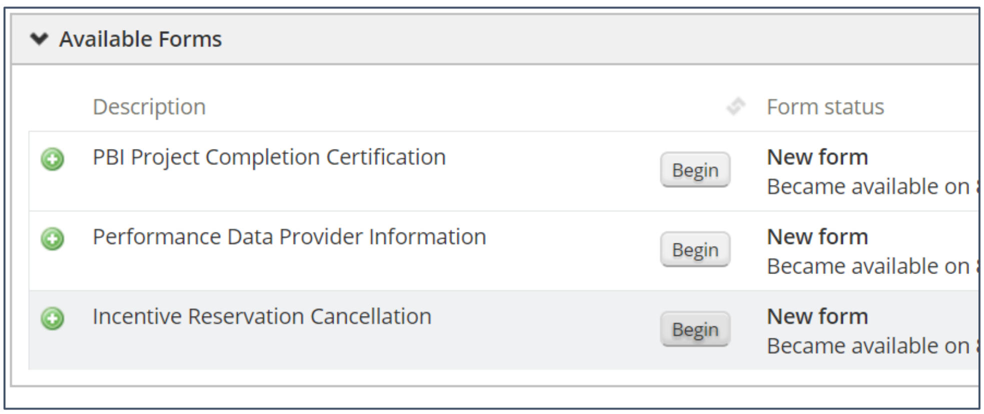
3. Submit the form, and your application will move to Withdrawn status. You may now edit and re-submit Application forms as needed.

Application Cancellation – EPBB or PBI

1. If you need to cancel an incentive reservation, click “View / Edit” on the application on the home screen. This step only applies to projects in PBI Approved or EPBB Approved statuses.



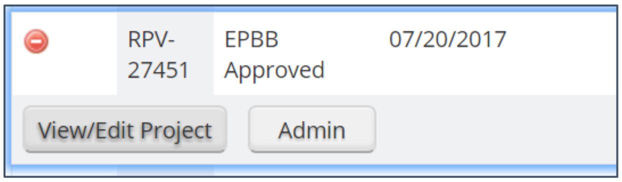
2. Find the “Application Cancellation” form among the list of available forms and click Begin



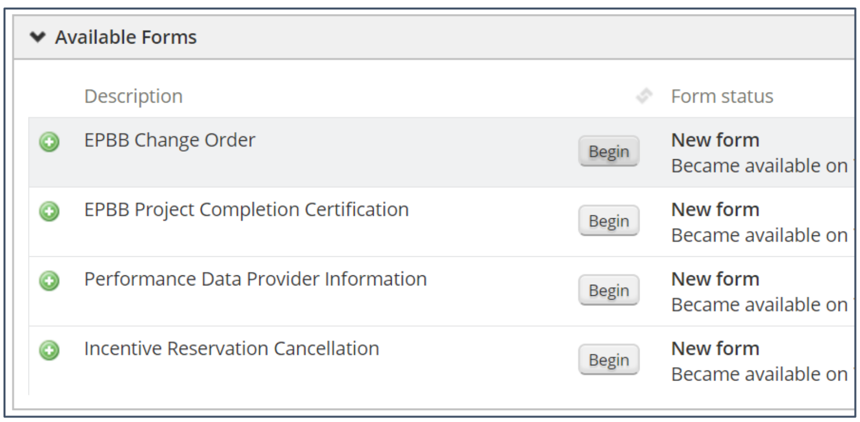
3. Complete and submit the form, and your application will move to Cancelled status. **This cannot be undone.** If a project is revived, it must be submitted as a new application.

Change Order – EPBB

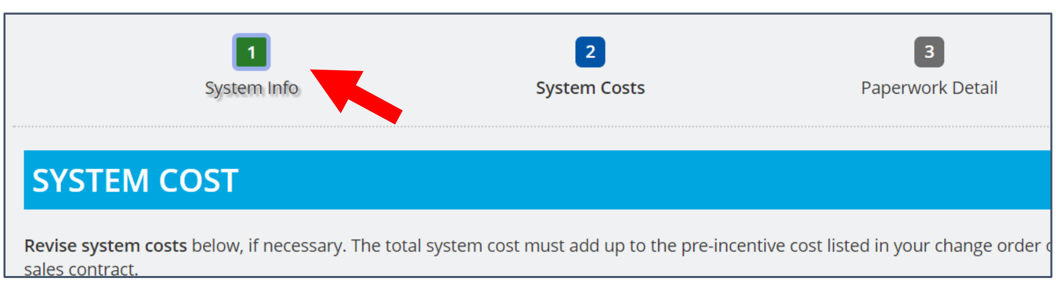
1. If you need to change any information in your EPBB Application, click “View / Edit” on the application on the home screen.



2. Find the “EPBB Change Order” form among the list of available forms and click Begin. This form is only available when a project is in EPBB Approved, Change Order Rejected or Change Order Approved statuses.



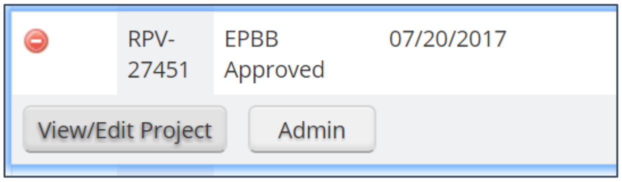
3. Make the edits needed. To edit the system info, click on “System Info” at the top of the screen or click “back” at the bottom of the screen. After you have made edits to the System Info, System Costs and uploaded attachments where applicable, submit the form. Your application will move to “Change Order Submitted” status.



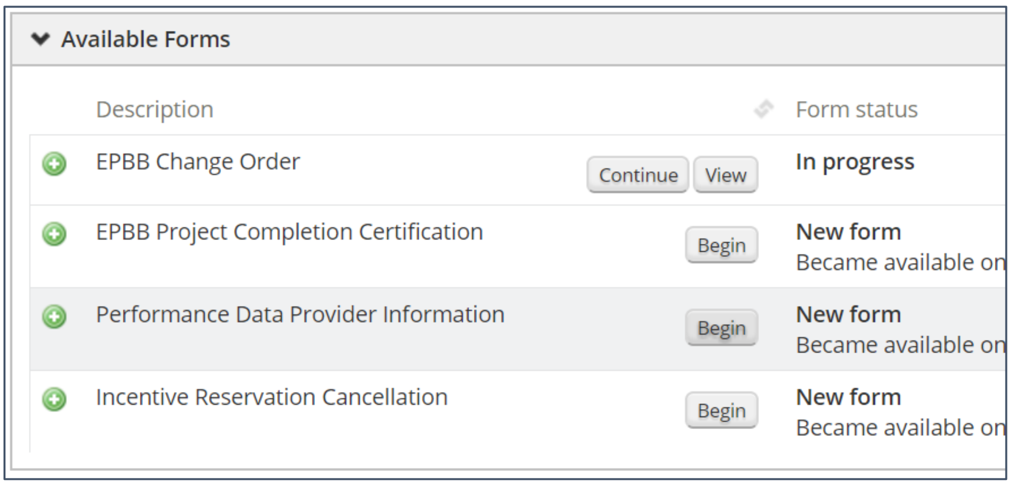
4. If your submission contains errors, you will receive a Change Order Rejected email and the project will move to Change Order Rejected status. Read the email carefully and repeat steps 1-3 above.

Performance Data Provider Submission – EPBB or PBI

1. If you want to submit monitoring information before the Project Completion stage, click “View / Edit” on the application on the home screen.



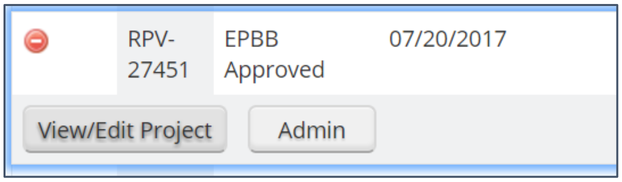
2. Find the “Performance Data Provider Information” form among the list of available forms and click Begin.



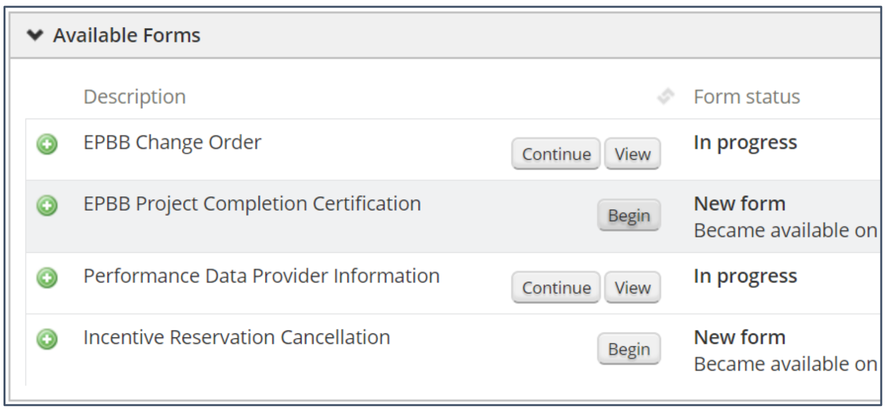
3. Enter the monitoring information and click “submit.” The status will not change. You may edit this information again using the same form by repeating steps 1-2 above, or while submitting the Project Completion information. You cannot edit this information *after* the completion stage.

Project Completion Certification – EPBB

1. To submit Project Completion information and request incentive payment, click “View / Edit” on the application on the home screen.

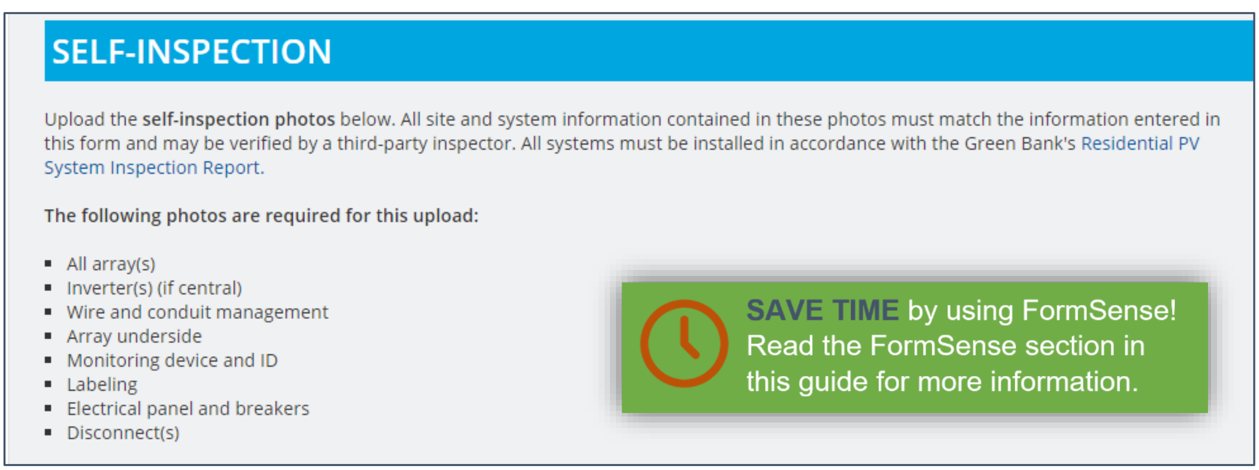


2. Find the EPBB Project Completion Certiication form and click “Begin”.



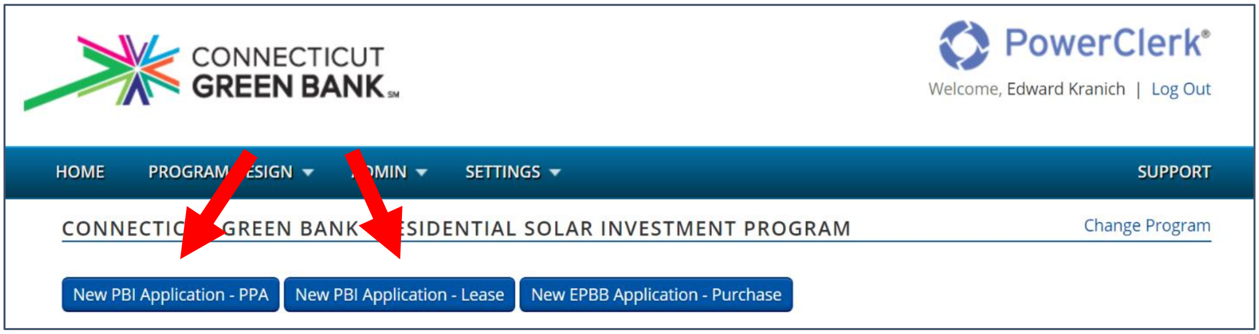
3. Follow the instructions to submit Completion Info and Paperwork Info. **When submitting the Utility Approval to Energize date, be sure that this matches the Approval to Energize data on your notice from the utility.**

4. The Self-Inspection page will request information previously not required in PowerClerk 1. The self-inspection form is no longer required, however you may find it useful to complete and keep a copy for your own records.



Application – PBI (PPA or Lease)

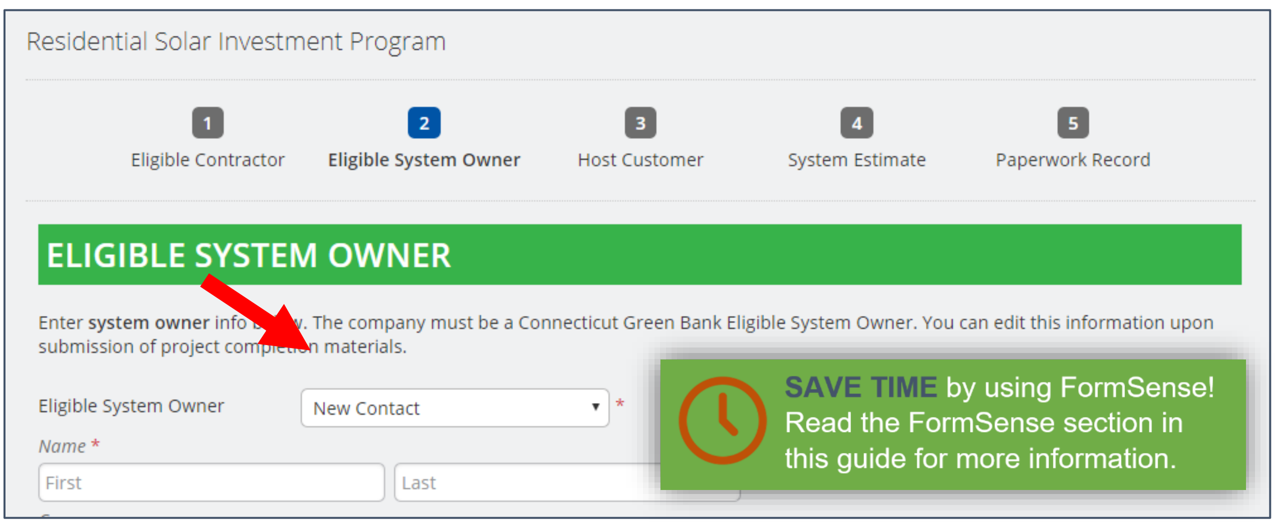
1. Click “New PBI Application – Lease” or “New PBI Application – PPA” depending on the financing type.



2. Enter Contractor information (including name, company and email address) on this screen. This is the Eligible Contractor with whom the customer has signed a contract. If you are not sure what to enter for this field, contact smallsolar@ctgreenbank.com.

   Click ‘next’ and enter System Owner information (including name, company and email address) on this screen. If the System Owner is the same entity as the Eligible Contractor, use the dropdown to prefill the contact fields. This information can be changed later at project completion.

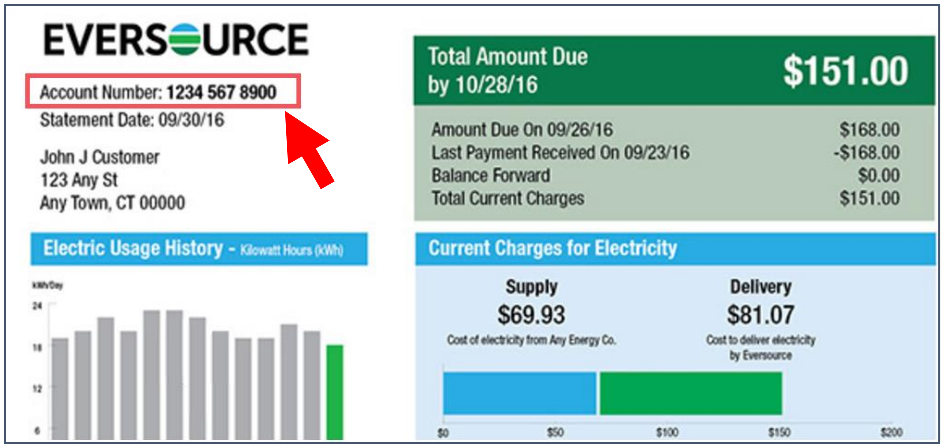
   For both Contractors and System Owners, we recommend entering a general email address in the “Installer Secondary Email” field (example: rebates@yourcompany.com).



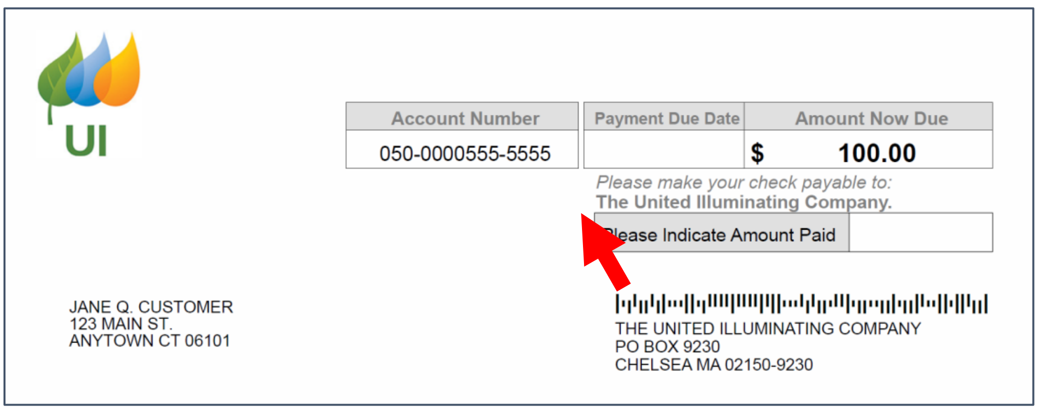
   We recommend entering a general email address in the “Installer Secondary Email” and “System Owner Secondary Email” fields (example: rebates@yourcompany.com).

3. Enter Host Customer and site info. The Utility Account Number should match the electric bill **exactly**:

Eversource:



UI:



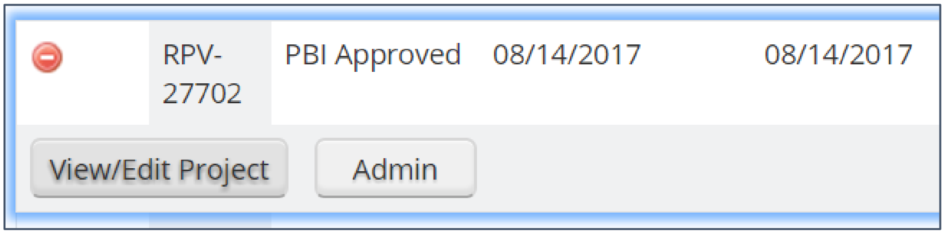
4. Enter the System Info. This is the *estimated* system to be installed, based on your contract.

5. Upload the required paperwork, and if applicable, the optional paperwork.

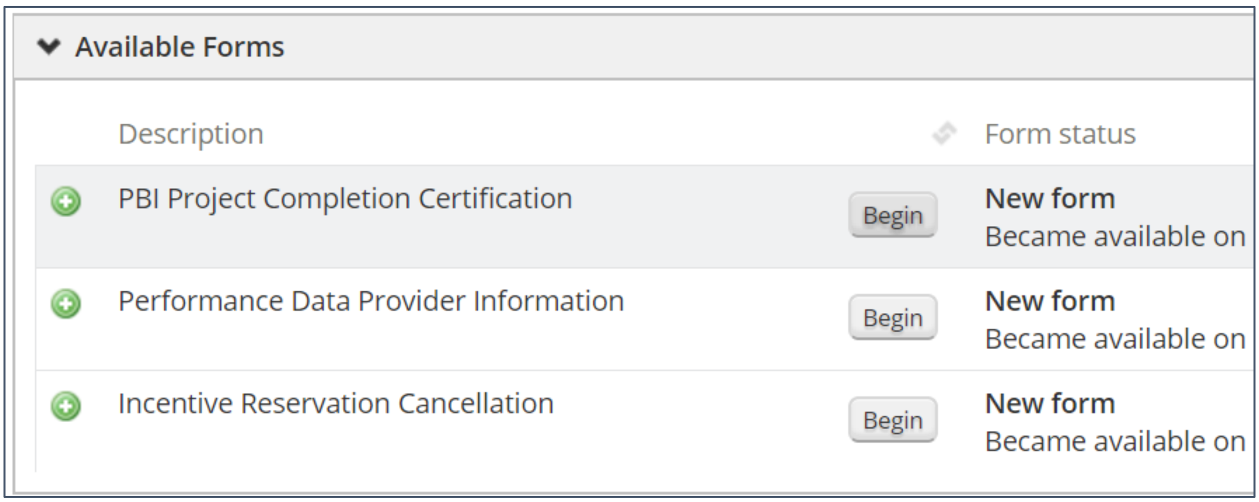
6. Click “submit” to change the status to “Submitted Via Internet” and receive your RPV number.

Project Completion Certification – PBI (PPA or Lease)

1. To submit Project Completion information and allow a project to receive PBI payments, click "View / Edit" on the application on the home screen.



2. Find the PBI Project Completion Certification form and click 'Begin'.

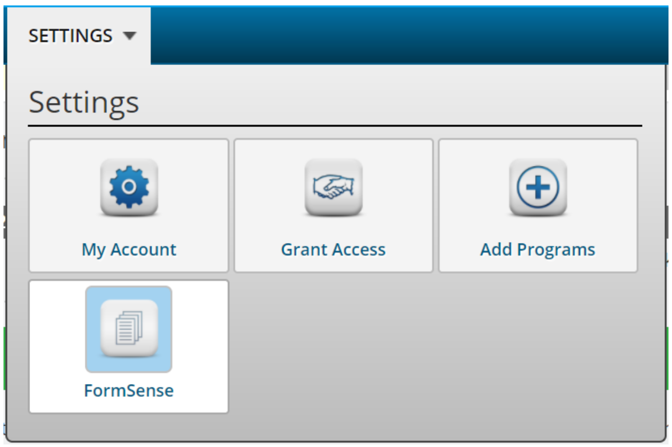


3. Edit the System Owner company if needed. You cannot edit the Host Customer or Contractor information.
4. Enter the System Info, including tilt, azimuth and shade *per array*. This <u>must match</u> the information on your contract and site design exactly. The shade should be entered as the <u>monthly solar access</u> *per array.* If you have multiple arrays, you will need multiple shade reports with unique monthly solar access readings (they can be grouped into a single shade report document upload)
5. Enter the system costs and system financing information.
6. Upload the required paperwork, and if applicable, the optional paperwork.
7. Enter the self-inspection information.
8. Click "submit" to change the status to "Submitted Via Internet" and receive your RPV number.

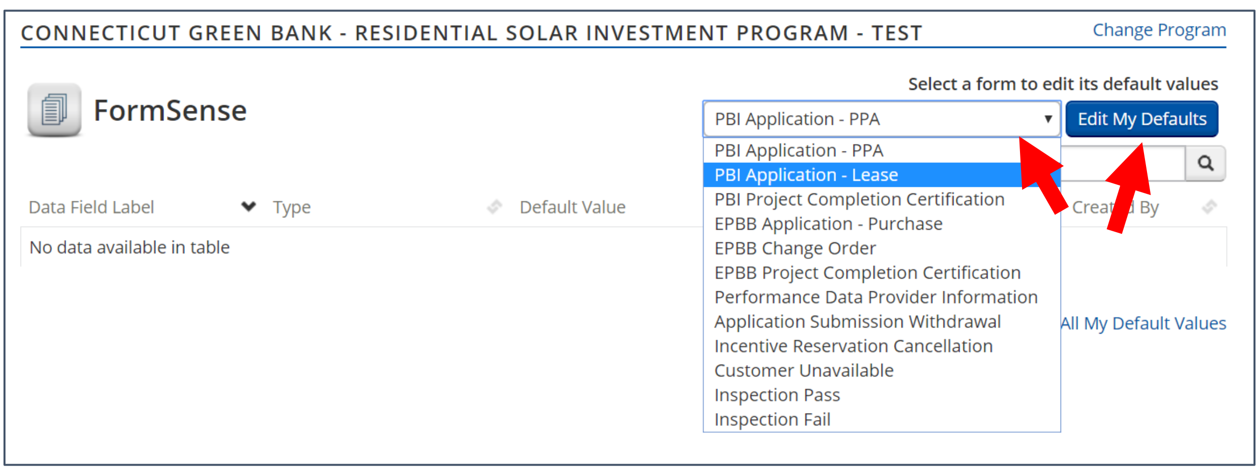
Formsense – EPBB or PBI

FormSense is a way to enter default values for certain fields and ensure that your team is entering consistent information in project records. Use FormSense to set default values for your contact information, your system owner, your site inspector or your electrician.

1. To use FormSense, click Settings / FormSense.



2. Select the form on which you would like to set default values and click Edit My Defaults.



NOTE: Many forms in PowerClerk 2 share fields. For example, if you set a default value for "Installer Contact" on the PBI Request – Lease form, that default value will also be set for EPBB Request – Purchase and PBI Request – PPA forms. So, you do not have to set values for multiple forms that use the same fields, but you also cannot set different values for the same field across different forms.

3. Complete the applicable fields as you like. You can set any individual fields, including specific components of contact information.
4. Click Save. The changes will take effect for the set fields ***going forward***. These changes will not impact previous applications. If you would like to change or remove information in FormSense for projects ***going forward***, simply repeat steps 1-2 above.

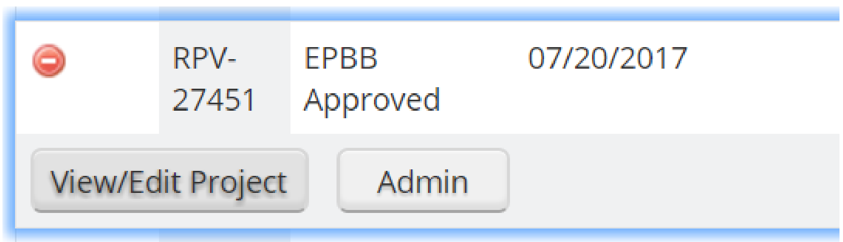
Granting Access – EPBB or PBI

Unlike PowerClerk 1, PowerClerk 2 does not connect users from the same Company to applications by default. Your coworkers will not be able to see applications you submitted (and vice versa) without Granting Access across accounts. There are two ways to grant access in PowerClerk.

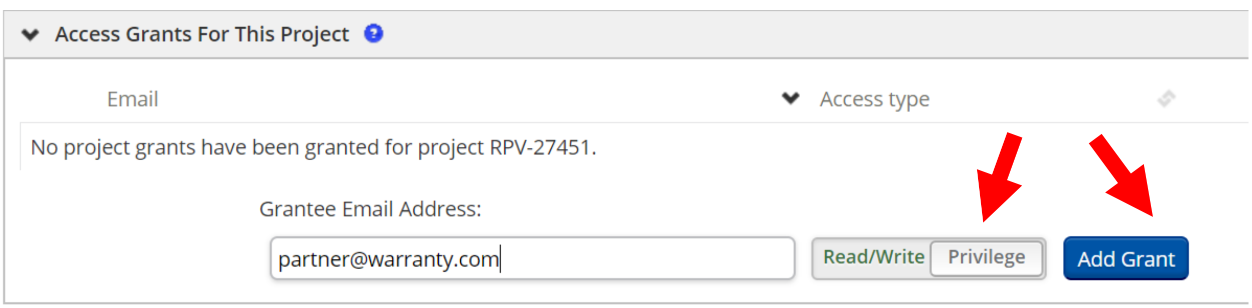
NOTE: Users must have a PowerClerk 2 account in the CGB RSIP Program before being granted access.

1. **Option 1: Grant Access to individual projects**. This is useful when granting access to a bank, warranty company or other partner.

   1. Click View/Edit project:

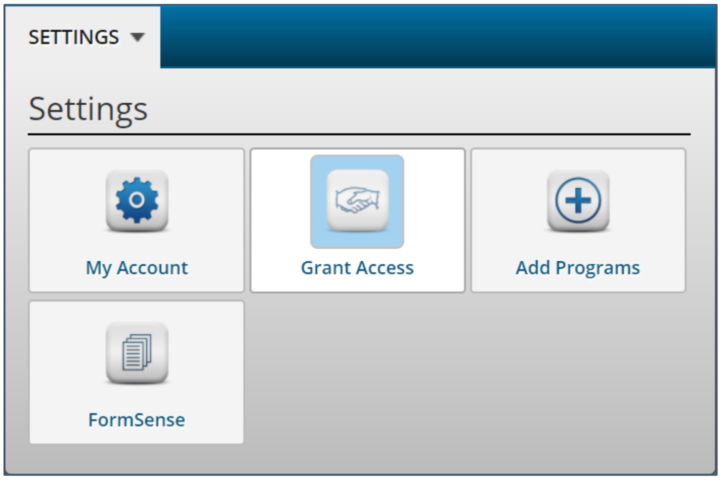
   

   2. Scroll down to "Access Grants For This Project", enter the email address of your partner, warranty company, insurance or finance provider, select whether you want to grant read/write or read only access, then click "Add Grant". You can add or revoke grants at any time.

2. **Option 2: Grant Access at account level.** This is useful and recommended when granting access within your company. This will allow your coworkers in different departments to share information.

   1. Click Settings / Grant Access



   2. Click “Grant Access” at the bottom right side of the screen, then enter the email address of the person or account.