



Residential Solar Investment Program

PowerClerk 2 Process Guide

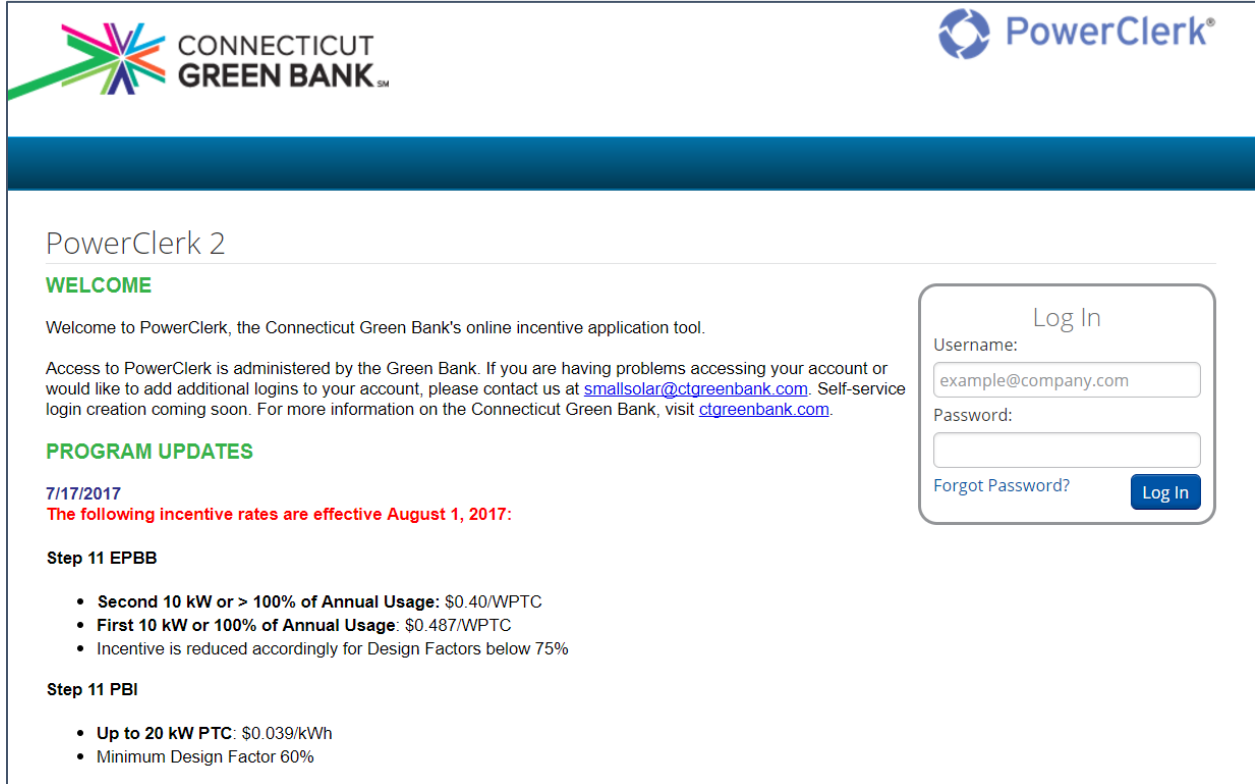
August 15, 2017



Contents

Login.....	2
Application – EPBB	3
Application Withdrawal – EPBB or PBI	6
Application Cancellation – EPBB or PBI	7
Change Order – EPBB.....	8
Performance Data Provider Submission – EPBB or PBI	9
Project Completion Certification – EPBB	10
Application – PBI (PPA or Lease)	11
Project Completion Certification – PBI (PPA or Lease)	13
Formsense – EPBB or PBI.....	14
Granting Access – EPBB or PBI	15

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.



PowerClerk 2

WELCOME

Welcome to PowerClerk, the Connecticut Green Bank's online incentive application tool.

Access to PowerClerk is administered by the Green Bank. If you are having problems accessing your account or would like to add additional logins to your account, please contact us at smallsolar@ctgreenbank.com. Self-service login creation coming soon. For more information on the Connecticut Green Bank, visit ctgreenbank.com.

PROGRAM UPDATES

7/17/2017
The following incentive rates are effective August 1, 2017:

Step 11 EPBB

- **Second 10 kW or > 100% of Annual Usage:** \$0.40/WPTC
- **First 10 kW or 100% of Annual Usage:** \$0.487/WPTC
- Incentive is reduced accordingly for Design Factors below 75%

Step 11 PBI

- **Up to 20 kW PTC:** \$0.039/kWh
- Minimum Design Factor 60%

Log In

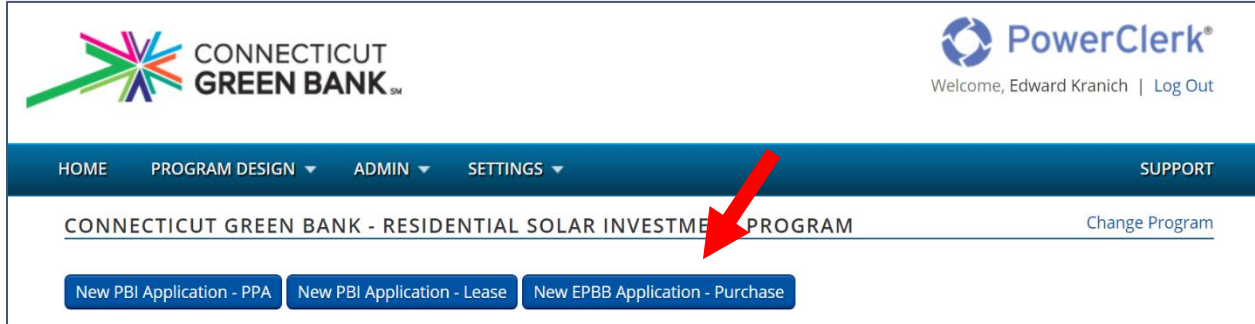
Username:

Password:

[Forgot Password?](#)

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).

Residential Solar Investment Program

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

Application Date

Approval Date

INSTALLER

Enter installer info below. The company must be a Connecticut Green Bank Eligible Contractor. You cannot edit this information later.

Installer *
Name *
Todd Flanders

Company
CT Sunshine Solar, LLC

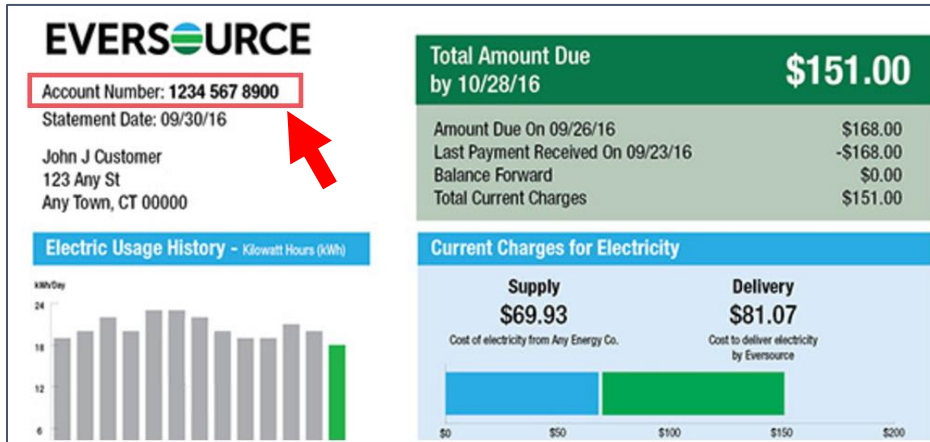
Address *
415 Main St.
Meriden CT 06450

Email *
todd@ctsunshine.com

SAVE TIME by using FormSense!
Read the FormSense section in this guide for more information.

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

Eversource:



EVERSOURCE

Account Number: **1234 567 8900**


Statement Date: 09/30/16

John J Customer
123 Any St
Any Town, CT 00000

Total Amount Due by 10/28/16 \$151.00

Amount Due On 09/26/16	\$168.00
Last Payment Received On 09/23/16	-\$168.00
Balance Forward	\$0.00
Total Current Charges	\$151.00

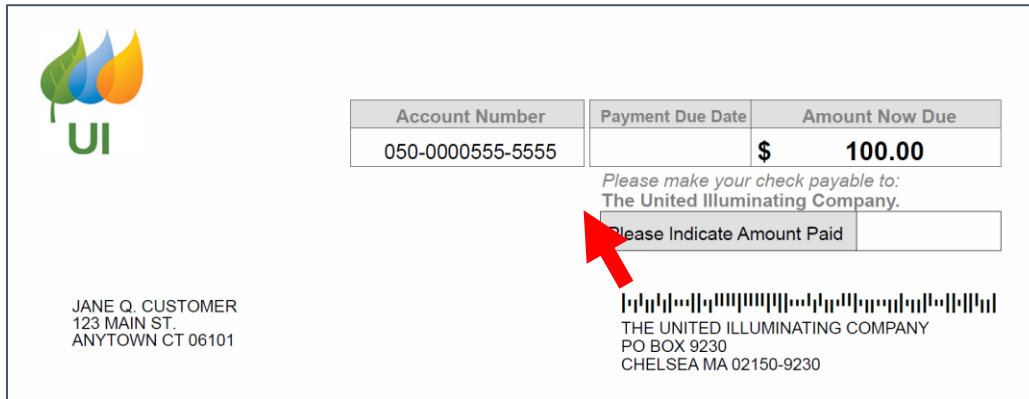

Electric Usage History - Kilo watt Hours (KWH)



Current Charges for Electricity

Supply \$69.93 <small>Cost of electricity from Any Energy Co.</small>	Delivery \$81.07 <small>Cost to deliver electricity by Eversource</small>
--	--

UI:

Account Number	Payment Due Date	Amount Now Due
050-0000555-5555		\$ 100.00

Please make your check payable to:
The United Illuminating Company.

Please Indicate Amount Paid

JANE Q. CUSTOMER
123 MAIN ST.
ANYTOWN CT 06101

THE UNITED ILLUMINATING COMPANY
PO BOX 9230
CHELSEA MA 02150-9230

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

Shading: % Solar Access (100 or blank - No Shading)

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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.

	RPV-27702	Submitted via Internet	08/14/2017	08/14/2017
View/Edit Project		Admin		

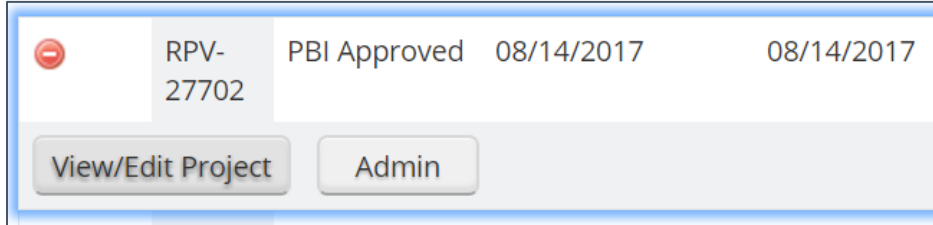
2. Find the “Application Withdrawal” form among the list of available forms and click Begin.

▼ Available Forms	
Description	Form status
 Application Submission Withdrawal	Begin New form Became available on

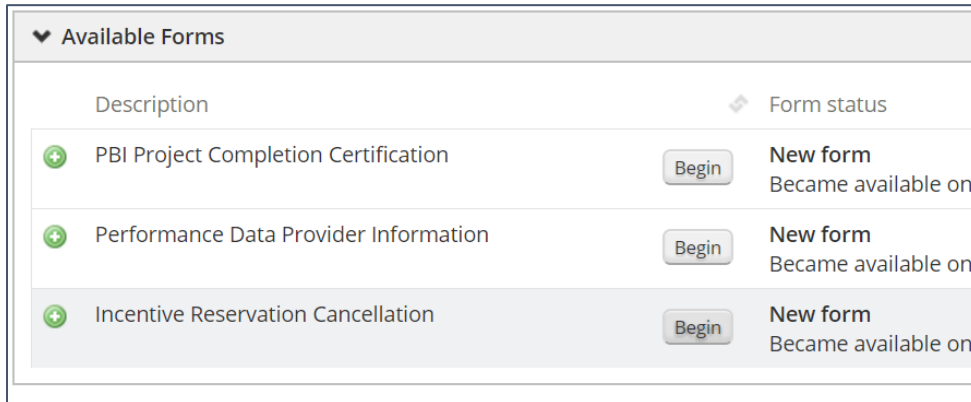
3. Submit the form, and your application will move to Withdrawn status. You may now edit and re-submit Application forms as needed.

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.



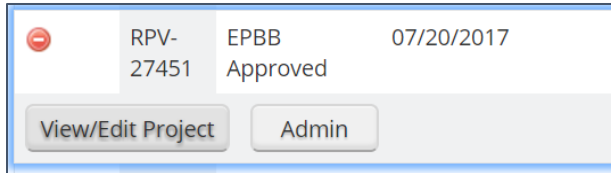
2. Find the “Application Cancellation” form among the list of available forms and click Begin



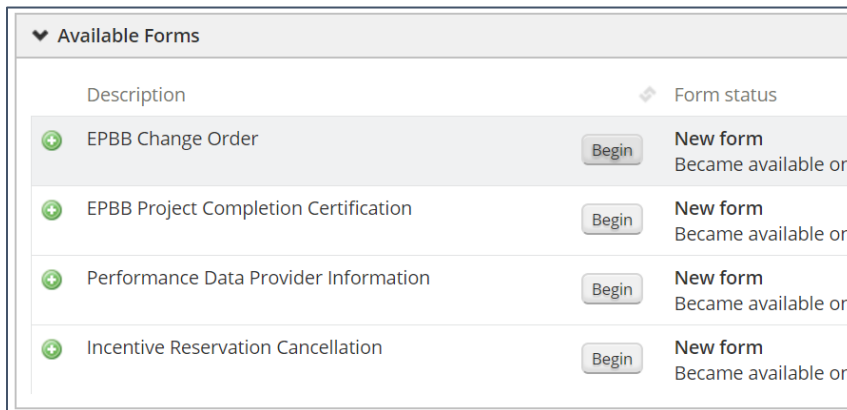
3. Complete and submit the form, and your application will move to Cancelled status. **This cannot be undone.** If a project is revived, it must be submitted as a new application.

Change Order – EPBB

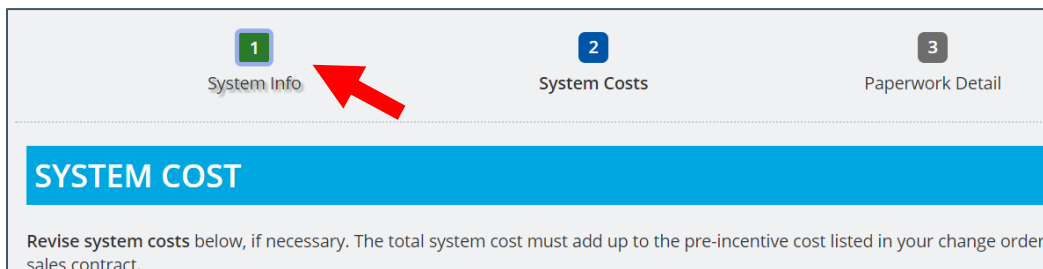
1. If you need to change any information in your EPBB Application, click “View / Edit” on the application on the home screen.



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.



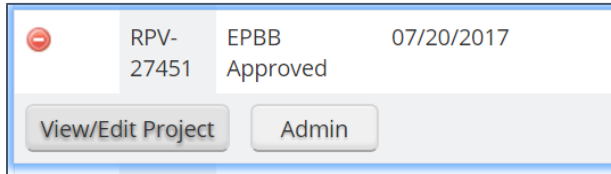
3. Make the edits needed. To edit the system info, click on “System Info” at the top of the screen or click “back” at the bottom of the screen. After you have made edits to the System Info, System Costs and uploaded attachments where applicable, submit the form. Your application will move to “Change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



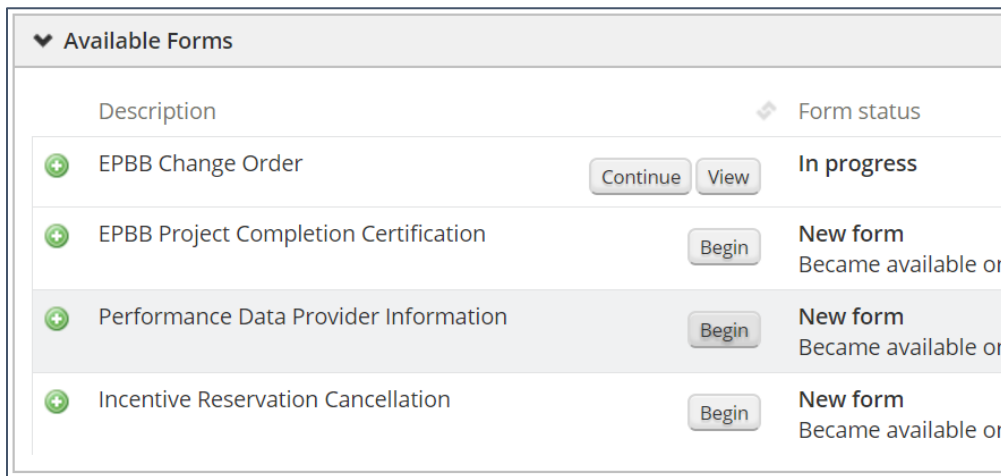
4. If your submission contains errors, you will receive a Change Order Rejected email and the project will move to Change Order Rejected status. Read the email carefully and repeat steps 1-3 above.

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.



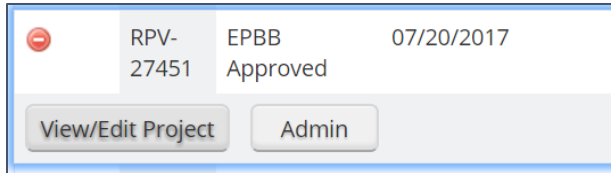
2. Find the “Performance Data Provider Information” form among the list of available forms and click Begin.



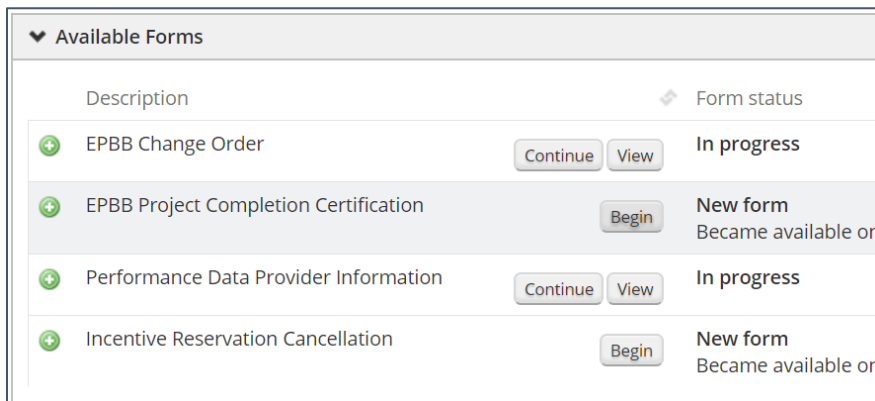
3. Enter the monitoring information and click “submit.” The status will not change. You may edit this information again using the same form by repeating steps 1-2 above, or while submitting the Project Completion information. You cannot edit this information *after* the completion stage.

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 Certification 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.

SELF-INSPECTION

Upload the self-inspection photos below. All site and system information contained in these photos must match the information entered in this form and may be verified by a third-party inspector. All systems must be installed in accordance with the Green Bank's Residential PV System Inspection Report.

The following photos are required for this upload:

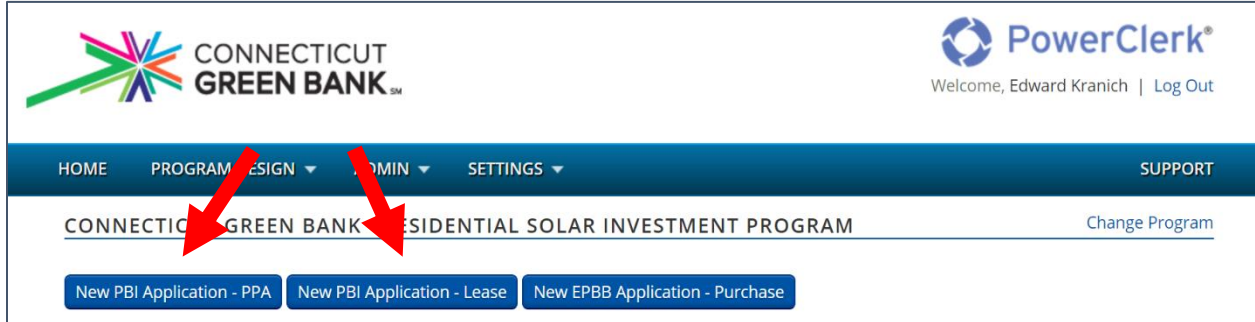
- All array(s)
- Inverter(s) (if central)
- Wire and conduit management
- Array underside
- Monitoring device and ID
- Labeling
- Electrical panel and breakers
- Disconnect(s)



SAVE TIME by using FormSense!
Read the FormSense section in this guide for more information.

Application – PBI (PPA or Lease)

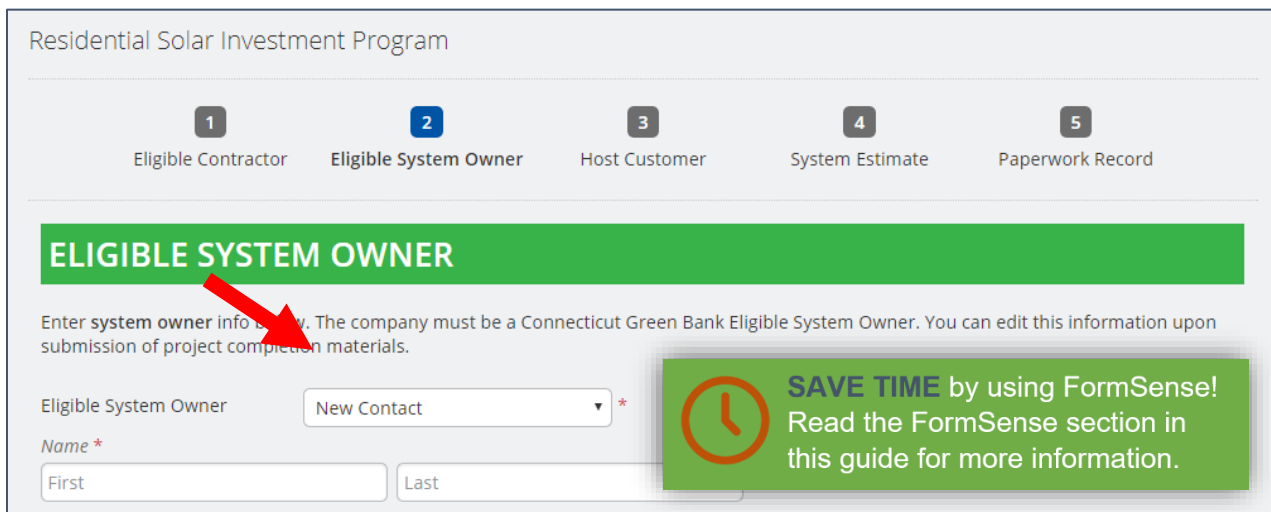
1. Click “New PBI Application – Lease” or “New PBI Application – PPA” depending on the financing type.



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).

A screenshot of the "Residential Solar Investment Program" application form. At the top, there is a progress bar with five steps: 1. Eligible Contractor, 2. Eligible System Owner, 3. Host Customer, 4. System Estimate, and 5. Paperwork Record. Step 2 is highlighted in blue. Below the progress bar is a green header for "ELIGIBLE SYSTEM OWNER". The main text says "Enter system owner information. The company must be a Connecticut Green Bank Eligible System Owner. You can edit this information upon submission of project completion materials." There is a red arrow pointing to this text. Below the text is a form with a dropdown menu for "Eligible System Owner" set to "New Contact". Underneath are two input fields for "Name" with "First" and "Last" labels. To the right of the form is a green callout box with a clock icon and the text "SAVE TIME by using FormSense! Read the FormSense section in this guide for more information."

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:

EVERSOURCE

Account Number: **1234 567 8900**
 Statement Date: 09/30/16
 John J Customer
 123 Any St
 Any Town, CT 00000

Total Amount Due by 10/28/16 \$151.00

Amount Due On 09/26/16	\$168.00
Last Payment Received On 09/23/16	-\$168.00
Balance Forward	\$0.00
Total Current Charges	\$151.00

Electric Usage History - Kilo watt Hours (KWh)

Current Charges for Electricity

Supply \$69.93 Cost of electricity from Any Energy Co.	Delivery \$81.07 Cost to deliver electricity by Eversource
---	---

UI:

UI

Account Number	Payment Due Date	Amount Now Due
050-0000555-5555		\$ 100.00

Please make your check payable to:
The United Illuminating Company.

Please Indicate Amount Paid

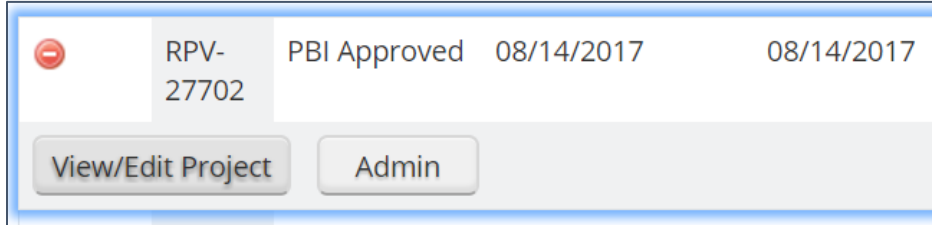
JANE Q. CUSTOMER
 123 MAIN ST.
 ANYTOWN CT 06101

THE UNITED ILLUMINATING COMPANY
 PO BOX 9230
 CHELSEA MA 02150-9230

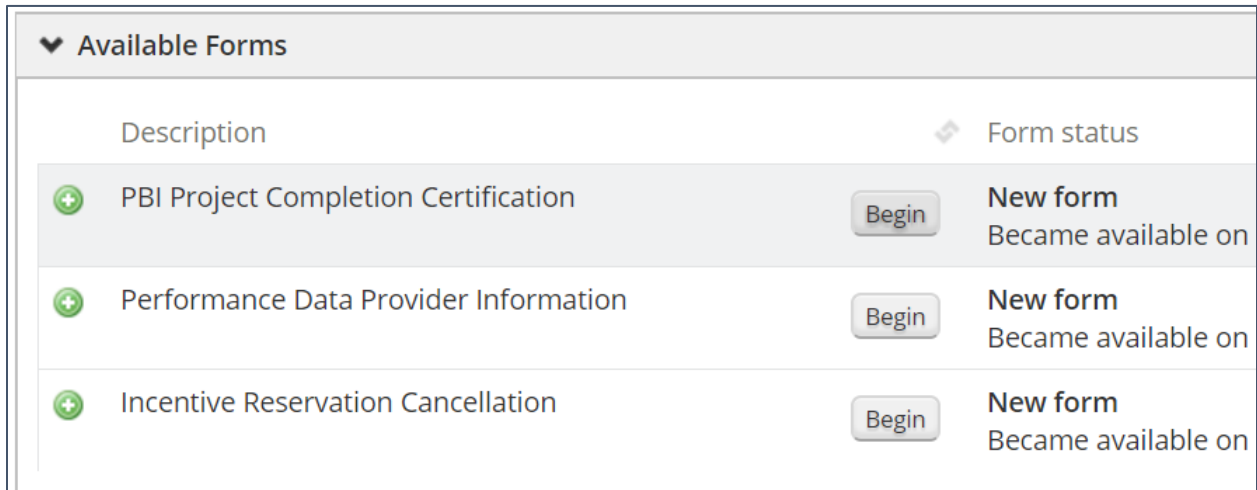
4. Enter the System Info. This is the *estimated* system to be installed, based on your contract.
5. Upload the required paperwork, and if applicable, the optional paperwork.
6. Click “submit” to change the status to “Submitted Via Internet” and receive your RPV number.

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'.

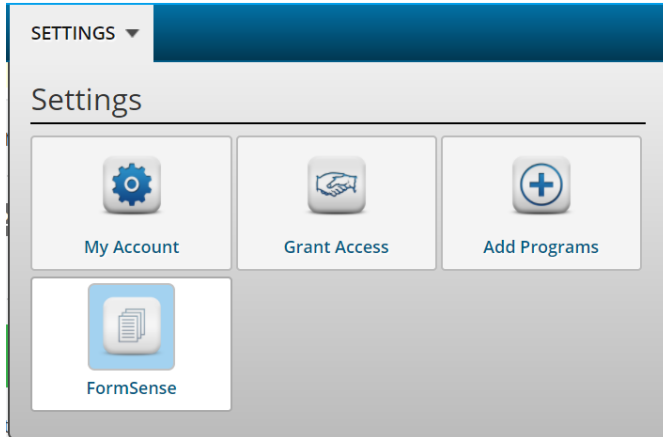


3. Edit the System Owner company if needed. You cannot edit the Host Customer or Contractor information.
4. Enter the System Info, including tilt, azimuth and shade *per array*. This must match the information on your contract and site design exactly. The shade should be entered as the monthly solar access per array. If you have multiple arrays, you will need multiple shade reports with unique monthly solar access readings (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.

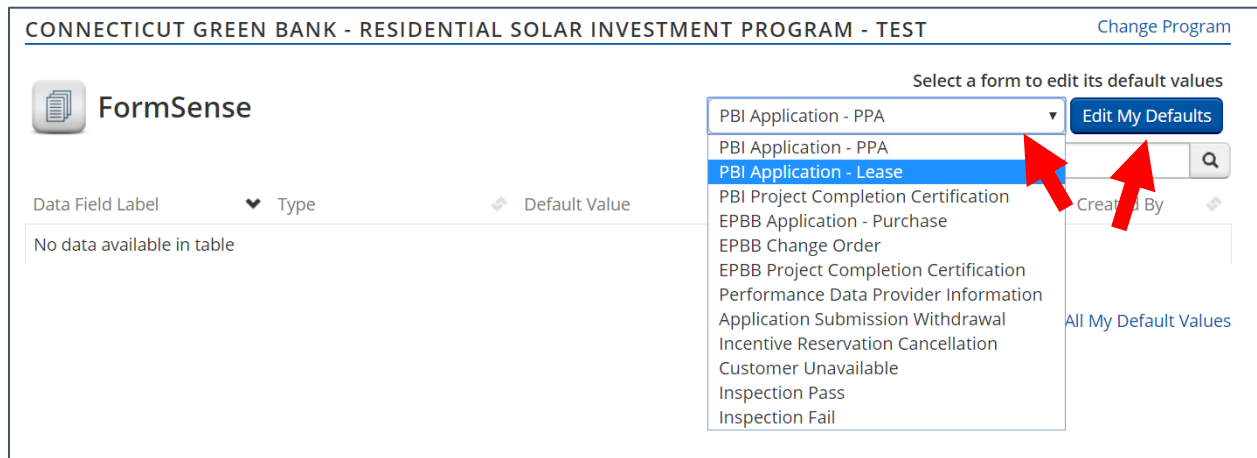
Formsense – EPBB or PBI

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.

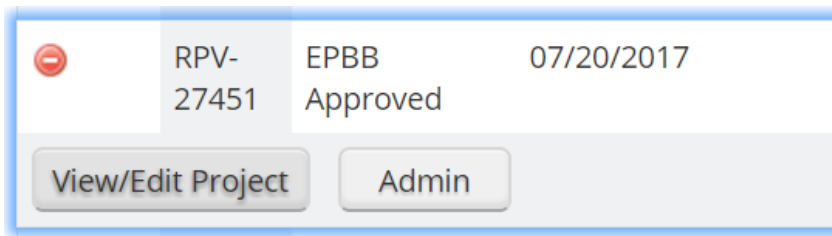
Granting Access – EPBB or PBI

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.

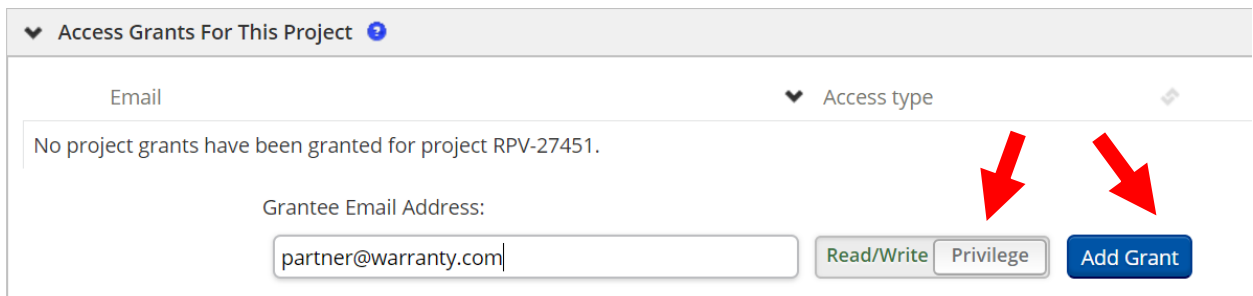
NOTE: Users must have a PowerClerk 2 account in the CGB RSIP Program before being granted access.

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:

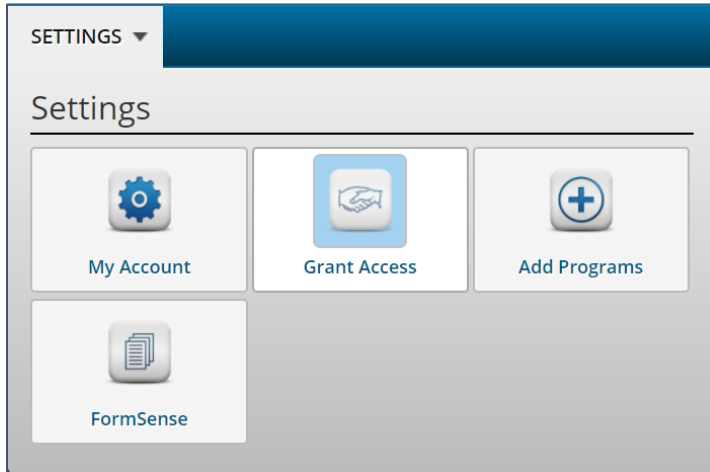


2. Scroll down to “Access Grants For This Project”, enter the email address of your partner, warranty company, insurance or finance provider, select whether you want to grant read/write or read only access, then click “Add Grant”. You can add or revoke grants at any time.

A screenshot of the 'Access Grants For This Project' section in a software interface. The section title is 'Access Grants For This Project' with a dropdown arrow and a plus icon. Below the title is a table with columns 'Email' and 'Access type'. The table is empty, with a message: 'No project grants have been granted for project RPV-27451.' Below the message is a form with a label 'Grantee Email Address:' and a text input field containing 'partner@warranty.com'. To the right of the input field are two buttons: 'Read/Write Privilege' and 'Add Grant'. Two red arrows point to the 'Add Grant' button.

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.

