



Applicant Training Guide

November, 2022





PowerClerk Overview

Account Registration
Features and Functions

Implementation Plan

Re-direct from [Renewable Energy Solutions - UI \(uinet.com\)](#)

Migrate Existing DG Database

Application Process (Live Recording)

How to submit new **UI** applications using PowerClerk

Available Forms

VersaForms
e-signatures / payments

PowerClerk Home / Project Page

Status
Communication

Support

How to ask a question when using PowerClerk
Resources



PowerClerk is the online application portal for CT Distributed Energy Interconnection and Residential Renewable Energy Solutions (“RRES”) applications:

- Create and submit new Applications
- Communicate with UI representatives from DG and RRES Team
- Collaborate with colleagues and customers, agents, installers.
- Monitor project/application status and updates

RESOURCES



Support Center

- Provides *written* explanations of every single feature in PowerClerk
- [Video Tutorials Learning Management System](#)
- Support via “Ask a Question” unrelated to specific project

DESIGN ▾ ADMIN ▾ SETTINGS ▾ SUPPORT CENTER ASK A QUESTION

Report

Ask A Question

Is your question related to a specific project?

Yes
 No

Do you have a general question about this program?

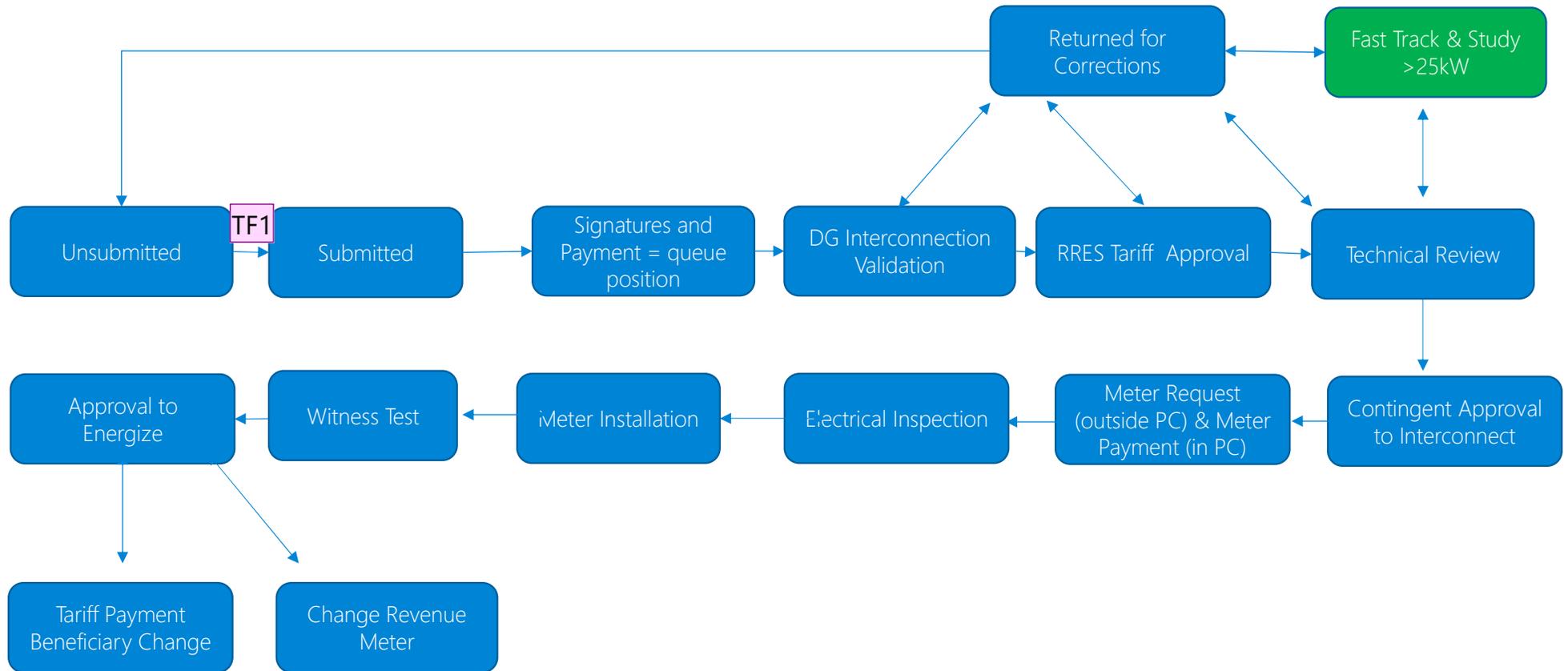
Visit our support site:
<https://www.uinet.com/wps/portal/uinet/network/footer/suppliersandpartners/servicesandresources/interconnection!/ut/p/z1/tV>

Email our support address:
res.renewableenergysolutions@uinet.com

Call our support line:
800.722.5584

OK

UI PowerClerk Application Process Overview



Slide 5

TF1 there should be a box between RRES Tariff Approval and Contingent Approval to Interconnect. The box should say Technical Review and follow normal workflow process AND there should be a bidirectional arrow between Technical Review and Returned for Corrections.

TARA LENA FOLZ, 11/7/2022

Implementation Schedule



Training



November 8-10

DG Database
Migration



No new applications
After 5pm on Friday
11/11 on old portal

Go-Live for New
Residential Applications



Week of 11/21 depending
on DG migration outcome



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:
example@company.com

Password:

Log In

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

Roles And Programs

Role: *
Applicant

Programs: *
 DER Interconnection

I'm not a robot

reCAPTCHA
Privacy - Terms

Already have a PowerClerk Account?



Step One

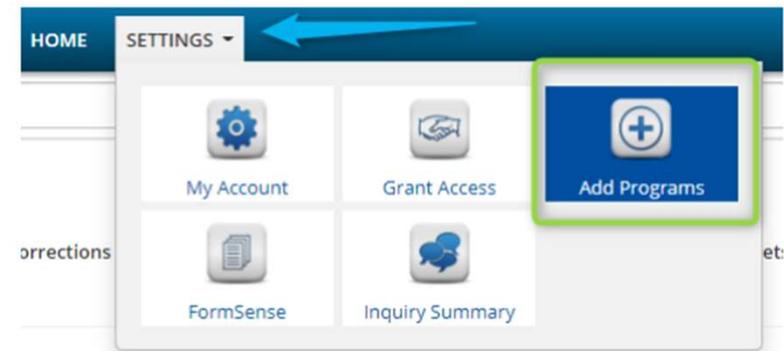
- Log Into your PowerClerk account. Any PowerClerk account will do.

Step Two

- Select the Settings Menu and select “Add Programs”.

Step Three

- Under “Program to Add”
- Select “UI – Renewable Energy Solutions & Distributed Generation”



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.



Welcome, Aaron Smith | Log Out

HOME PROGRAM DESIGN ▾ ADMIN ▾ SETTINGS ▾ SUPPORT CENTER

ASK A QUESTION



UNITED ILLUMINATING - DISTRIBUTED GENERATION

New 25kW and Less Interconnection Application

New Fast Track and Study Process Application

New Non-Residential Bid

All Projects Signatures & Payment Analyst Payment Review DG Interconnection Validation Vendors Docs Review RRES Application Review Application Corrections Required DG Interconnection Technical Review
Design Review Feedback Contingent Approval Pending Electrical Inspector Release Pending Meter Installation Meter Installation Witness Testing Approval To Energize

Change Program



Form Sense



HOME PROGRAM DESIGN ADMIN SETTINGS SUPPORT CENTER

UNITED ILLUMINATING - DISTRIBUTED ENERGY SERVICES

FormSense

FormSense helps you save time on forms you fill out by automating the process of filling out the same form. Modifying your FormSense defaults allows you to customize the form to your needs.

Select a form to edit its FormSense defaults:

25kW and Less 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.

My Account Grant Access FormSense Inquiry Summary

Shared Access



1. FormSense
2. Grant Access
3. VersaForm

Job for AHJ Release
None

Electrical Release Recd
No

Available Forms

Description

Application Signatures and Payment Information

Form Status

In Progress

My Account

Grant Access

FormSense

Inquiry Summary

Previous Forms

Description

Form Status

25kW and Less Interconnection Application

View

Submitted

Last submitted 10/31/2022 at 4:06 PM

Ask A Question Threads

This project has no inquiries.

Access Grants For This Project ?

No project grants have been granted for project: DER-00073

Grantee Email Address:

Read Only

Read/Write

Attachments

Upload Timestamp	Description	Filename	Note
11/1/2022 3:25:57 PM	REC assignment form	REC Assignment Form.pdf	View
11/1/2022 3:25:57 PM	Tariff Payment Beneficiary Form	Tariff Payment Beneficiary Form.pdf	View
11/1/2022 3:25:57 PM	Signed 25 kW and Less Renewable Energy Solutions an	Renewable Energy Solutions Tariff Application.pdf	View

Application Process

Internal Use

Old Portal URL will re-Direct to PowerClerk



→ ↻ 🏠 🔒 https://www3.uinet.com/DistributedGeneration/Logon.aspx

 Distributed Generation Projects

Distributed Generation Projects Login

Username:

Password:

Username or Password is invalid - try again.

[Log In](#)

[Forgot your username?](#)
[Forgot your password?](#)
[Change your password?](#)
[Don't have a username?](#)
[Create a username and password](#)



PowerClerk

Renewable Energy Solutions

The United Illumination Company

Distributed Generation - Interconnection and Tariff Application Submission

Welcome to UI's PowerClerk distributed generation interconnection and tariff application portal.

This site is intended for Solar Project Developers to submit interconnection and/or tariff applications on behalf of UI customers for projects that are <25kW in size.

Project status can be followed in this portal through project interconnection.

Log In

Username:

Password:

Log In

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

New Applications



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



HOME PROGRAM DESIGN ▾ ADMIN ▾ SETTINGS ▾ SUPPORT CENTER

UNITED ILLUMINATING - DISTRIBUTED GENERATION

New 25kW and Less Interconnection Application

New Fast Track and Study Process Application

New Non-Residential Bid



Application Navigation



After selecting your application 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.

25 kW and Less Renewable Energy Solutions Program





Differences Between Tariffs

Which Renewable Energy Tariff type is the application for? * ?

- Buy-All Tariff
- Netting Tariff

- No Alternative Meter available for Buy All
- Tariff Payment Beneficiaries must be designated to equal 100%
- Adding to existing PV generation is only eligible for Buy-All Tariff

Uploading Documents



HOME PROGRAM DESIGN ADMIN SETTINGS SUPPORT CENTER ASK A QUESTION

25 kW and Less Renewable Energy Solutions Program Saved ✓

2 Customer Information 3 Energy Producing Information 4 Residential Renewable Energy Solutions 5 Supporting Documentation

HOME PROGRAM DESIGN ADMIN SETTINGS SUPPORT CENTER

Business Classification.docx
Uploaded by Sabrina Hern on 11/2/2022 5:00:21 PM

One Line Diagram *

Business Classification.docx
Uploaded by Sabrina Hern on 11/2/2022 5:00:46 PM

Site Plan *

Business Classification.docx
Uploaded by Sabrina Hern on 11/2/2022 5:00:52 PM

Technical Specification Documents *

Uploading Business Classification.docx

1-4 Family Documentation *

Additional Application Attachment 1

Additional Application Attachment 2



Alternative Meter Request Form

Production meter must be subsequently installed by June 2023. Alternative Meter Request form and Affidavit required.

[Meter socket guidelines can be found in Guidebook for Requirements for Electric Service](#)

Note: Non-bypass sockets must be replaced within 5 years, per PURA). Alternative Meter Request form and Affidavit required.

Due to safety considerations, the following characteristics must be adhered to for a non-bypass sockets to be considered for inclusion on this list:

- (1) Ringless cover required
- (2) Nema 3R rating required
- (3) Horn bypass not permitted

For NETTING projects only, select one production metering configuration. * ?

- Production Meter with Bypass Socket (Standard Configuration)
- Production Meter / Temporary Non-Bypass socket per exception
- No Production Meter, temporary allowance (Use Inverter Data)

New Vendor Creation Form



FORM-VE-US-02

Vendor Creation/Modification Form

AVANGRID vendor ID # [REDACTED]
Only enter if modifying existing vendor #

> Contact Person:

Name:			
E-mail ⁽¹⁾ :		Phone:	

> Payment Remittance Address (ALL fields are required): All digits required XXX-XX-XXXX

Name:			Tax ID:		
DBA:			Country:		
Address:					
City:		State:		Zip +4:	-
E-mail:				Phone:	

> Purchase Order Address (only if different from the Remittance Address):

Address:			Country:		
City:		State:		Zip +4:	-
E-mail:				Phone:	

> Required documentation for vendor registration or address modification:

- Copy of W9 (US Vendor) / W8 (Foreign Vendor) form.
- Business Classification form.

Description of goods or services to be provided:

If non-US vendor, please indicate if services will be on US soil: Yes No
Do not check either box

Bank details: Bank detail updates must be processed through Minfo. Once a vendor # has been assigned, an email will be delivered with complete details.



Options for Uploading Documents



After you click “sign and upload”, then click “preview document”

How would you like to execute your application? * 

eSign

Upload Signed Document

Recommended e-sign process.

Option exists to over-write by using “Upload Signed Document” completed previously outside of PowerClerk.

Auto-population feature will not work so ensure documents match application to avoid delays.

Download the filled-out file:

Renewable Energy Solutions Tariff Application * (Sign and Upload) [Change Signature Type](#)

[Preview Document](#)



[Browse](#)

Application Submission



Submission

To review the UI webpage, [click here](#).

I hereby certify that, to the best of my knowledge, all the information provided in this Application is true, correct. * 

NOTE: Facsimile or electronic (e.g., pdf) execution and delivery of this Interconnection Application is legal, valid and binding for all purposes.

[NEXT STEPS - Application Signature and Payment Information](#)

After submitting this Application form you will be required to fill out the **Application Signature & Payment Information** form in order for this application request to be complete.

Once this project is submitted please do the following:

1. Select this project on your home screen and select "View/Edit"
2. Scroll down to the "Available Forms"
3. Select "Begin" next to the "1. Application Signature & Payment Information" form.





If your Application has Errors

Once this project is submitted please do the following:

1. Select this project on your home screen and select "**View/Edit**"
2. Scroll down to the "**Available Forms**"
3. Select "**Begin**" next to the "**1. Application Signature & Payment Information**" form.

Unable to Submit Form

Please fix the errors below and try again.

Missing Required Fields:

- **Is the proposed system replacing an inactive or decommissioned system?** - [Page 4](#)

Invalid Form Inputs:

- **Customer of Record Service Address Information** : Phone number (770) 111-11111 does not follow expected format (xxx) xxx-xxxx - [Page 2](#)

Validation Failures:

- Additional validation checks cannot run until all errors are resolved.

Back

Submit

Success!



Thank you for your submission.

Your project number is:

DER-00076

Continue



Available Forms is how progress is made to next status



View/Edit: DER-00073 Go To Admin Go to DER- Go

Current Status

Status marked as Signatures & Payment on 10/31/2022 at 4:06 PM Project Owner: Sabrina Hern (Program_Designer)
Created on 10/31/2022 at 10:10 AM (1 day ago)
Last Updated on 11/1/2022 at 3:39 PM (1 hour ago)

Project Summary

Customer Name Spooky Skelton	Address 13 Friday St Stratrod CT 06614	Renewable Energy Tariff Request? Yes	Total System Size 0.2
Energy Source Solar	Battery Backup? No	Prime Mover Photovoltaic	Account Number 100001807885
Corrections Required? No	Corrections Description (if applicable) None	United Illuminating Project ID None	Renewable Energy Solutions Project ID RN
Job for AHJ Release None			Electrical Release Received? No

Available Forms

Description	Form Status
Application Signatures and Payment Information	Continue View In Progress

Previous Forms

Description	Form Status
25kW and Less Interconnection Application	View Submitted Last submitted 10/31/2022 at 4:06 PM





PowerClerk Notification Emails

You will receive emails from PowerClerk with action items. Inside these emails will be a **description of the action required** and a **link** to direct you to PowerClerk. Please follow the link to complete the action within the project page of PowerClerk

▼ Communications Sent to csmith@cleanpower.com		
Date	▲▼ Subject	▲▼
9/17/2022 12:41:00 PM	Signature and Payment Required for Interconnection Application United Illuminating DER-00058	View
9/16/2022 12:40:38 PM	Signature and Payment Required for Interconnection Application United Illuminating DER-00058	View
9/15/2022 12:39:40 PM	DER-00058 Application Submittal Confirmation	View
9/15/2022 12:39:39 PM	Internal: Application Payment Received - Start Evaluation	View



▼ Ask A Question Threads
<i>This project has no inquiries.</i>

Signatures



Application Signatures and Payment Information

Project Number: DER-00076

1

Signatures

2

Payment

Application Signatures

Please e-sign the Residential Renewable Energy Solutions Application and upload required documents.



Signatures



How would you like to execute your application? *

eSign

Upload Signed Document

Renewable Energy Solutions Tariff Application * (Electronic Signature)

Renewable Energy Solutions Tariff Application.pdf [View](#)

Electronically signed document received 11/2/2022 5:11:23 PM

25 kW or Less Interconnection Application WITH Authorized Agent * (Electronic Signature)

25 kW or Less Interconnection Application WITH Authorized Agent.pdf

[View](#)

Electronically signed document received 11/2/2022 5:10:28 PM

Third Party Customer Disclosure * (Electronic Signature)

Third Party Customer Disclosure.pdf [View](#)

Electronically signed document received 11/2/2022 5:11:23 PM

REC Assignment Form * (Electronic Signature)

REC Assignment Form.pdf [View](#)

Electronically signed document received 11/2/2022 5:11:24 PM

Tariff Payment Beneficiary Form * (Electronic Signature)

Tariff Payment Beneficiary Form.pdf [View](#)

Electronically signed document received 11/2/2022 5:11:24 PM

Tariff Payment Beneficiary W9 (can be for Third-Party OR Customer) *

Tariff Payment Beneficiary Form (2).pdf

[View](#)

[Remove](#)

Uploaded by Sabrina Hern on 11/2/2022 5:07:46 PM

Signatures



eSignature Status

Renewable Energy Solutions Tariff Application Ready for signature

Customer : shern@uinet.com

Owner : shern@uinet.com

25 kW or Less Interconnection Application WITH Authorized Agent Ready for signature

Customer : shern@uinet.com

Third Party Customer Disclosure Ready for signature

Customer : shern@uinet.com

Installer : shern@uinet.com

REC Assignment Form Ready for signature

Owner : shern@uinet.com

Tariff Payment Beneficiary Form Ready for signature

Customer : shern@uinet.com

Owner : shern@uinet.com

eSignature Status

Renewable Energy Solutions Tariff Application.pdf eSignature request sent: 11/2/2022 5:08:04 PM

Customer: shern@uinet.com eSignature request sent

Owner: shern@uinet.com eSignature request sent



Please Review & Act on These Documents



PowerClerk Demo
Clean Power Research

Powered by **DocuSign**

The following documents have been prepared by PowerClerk on behalf of United Illuminating as part of its Distributed

Please review the documents below.

FINISH

OTHER ACTIONS ▾



START

DocuSign Envelope ID: 21BC347B-3CC2-4A63-8F42-C5F7D12214E7

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com



Renewable Energy Solutions Application



Clean Power Research

The information contained in this presentation is confidential.

United Illuminating DG Interconnection
<DoNotReply@PowerClerk.com>



Completed: eSignature request: Project: DER-00076 - United Illuminating

 DocuSign Demo System <dse_demo@docusign.net>
To  SABRINA HERN

Retention Policy DPTv2 - 18 Months Permanently Delete (1 year, 6 months) Expires 4/30/2024

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

 Renewable Energy Solutions Tariff Application.pdf 208 KB	 Third Party Customer Disclosure.pdf 255 KB	 REC Assignment Form.pdf 218 KB
 Tariff Payment Beneficiary Form.pdf 204 KB		

DocuSign



Your document has been completed

[VIEW COMPLETED DOCUMENTS](#)





eSignature Status	
Renewable Energy Solutions Tariff Application.pdf	Completed: 11/2/2022 5:10:24 PM
Customer: shern@uinet.com	Completed
Owner: shern@uinet.com	Completed
25 kW or Less Interconnection Application WITH Authorized Agent.pdf	Completed: 11/2/2022
Customer: shern@uinet.com	Completed
Third Party Customer Disclosure.pdf	Completed: 11/2/2022 5:10:24 PM
Customer: shern@uinet.com	Completed
Installer: shern@uinet.com	Completed
Tariff Payment Beneficiary Form.pdf	Completed: 11/2/2022 5:10:24 PM
Customer: shern@uinet.com	Completed
Owner: shern@uinet.com	Completed
Renewable Energy Solutions Tariff Application.pdf	Completed: 11/2/2022 5:11:19 PM
Customer: shern@uinet.com	Completed
Owner: shern@uinet.com	Completed
Third Party Customer Disclosure.pdf	Completed: 11/2/2022 5:11:19 PM
Customer: shern@uinet.com	Completed
Installer: shern@uinet.com	Completed
REC Assignment Form.pdf	Completed: 11/2/2022 5:11:19 PM
Owner: shern@uinet.com	Completed
Tariff Payment Beneficiary Form.pdf	Completed: 11/2/2022 5:11:19 PM
Customer: shern@uinet.com	Completed
Owner: shern@uinet.com	Completed
Manage eSignature Request	

Payment



Application Signatures and Payment Information

Saving ... Project Number: DER-00076

1

Signatures

2

Payment

MAKE A PAYMENT

Financially Responsible Party Information

Payer Type:

Payer Type *

- Company, Corp, LLC, etc
- Individual

When entering the TIN below, please enter numbers only and avoid special characters such as dashes. Entering special characters will result in an error with the payment.

TIN

MFA

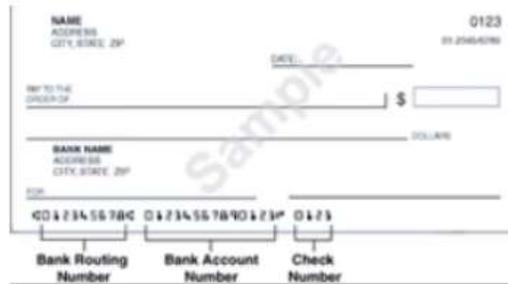


When entering the TIN below, please enter numbers only and avoid special characters such as dashes. Entering special characters will result in an error with the payment.

TIN

Bank Account Holder Name

Routing Number



Bank Account Number

HELP?

Help?

HOME PROGRAM DESIGN ADMIN SETTINGS SUPPORT CENTER

ASK A QUESTION

Ask A Question

Is your question related to a specific project?
 Yes
 No

Which project do you have a question about? *
DER-00058

Customer data for project DER-00058:
Connor Smith
Connor's Solar Company
csmith@cleanpower.com
(153) 091-3399
123 Broadway
Seattle, WA 98122

Which of these categories best describes your question? *
Select...

Enter a title for your question: *

Please describe your question in detail: *

Cancel Submit Question





PowerClerk Home Screen

Your PowerClerk Home Page will show **every** project that you have started, even those unsubmitted.
Projects Filtered by Status

To view an individual project landing page, **select** the project followed by “View/Edit Project”.

Project #	Application Type	Tariff Project ID	Already Reviewed?	Current Status	Current Status Timestamp	Renewable Energy Solutions	Installer	Customer Name	Street Address
DER-00076	25kW and Less			Signatures & Payment	11/02/2022	Yes	Solar Inc	Sabrina A	123 Elm St

View/Edit Project Admin

Project Status



All Projects Signatures & Payment Application Corrections Required Design Review Feedback Witness Testing Approval To Energize

Previous Forms	
Description	Form Status
Approval To Energize	View Submitted Last submitted 6/22/2022 at 3:12 PM
REVIEW: Witness Testing Corrections	View Submitted Last submitted 6/22/2022 at 3:09 PM
Self-Inspection Documentation	View Submitted Last submitted 6/22/2022 at 3:08 PM
Electrical Inspection Completion	View Submitted Last submitted 6/22/2022 at 2:36 PM
Issue Contingent Approval	View Submitted Last submitted 6/22/2022 at 1:52 PM
Technical Review 25kW and Less Interconnection Application	View Submitted Last submitted 6/22/2022 at 1:23 PM
RRES REVIEW 25kW and Less Interconnection Application	View Submitted Last submitted 5/27/2022 at 3:14 PM
Interconnection Validation 25kW and Less Interconnection Application	View Submitted Last submitted 5/27/2022 at 3:04 PM
Analyst Payment Review	View Submitted Last submitted 5/27/2022 at 3:02 PM
Application Signatures and Payment Information	View Submitted Last submitted 5/25/2022 at 3:04 PM
25kW and Less Interconnection Application	View Submitted Last submitted 5/24/2022 at 9:02 AM



Resources [Renewable Energy Solutions - UI \(uinet.com\)](#)

- **Program manual:**
<https://www.uinet.com/documents/1678076/1703582/Residential%2BRenewable%2BEnergy%2BSolutions%2BProgram%2BManual%2Bv%2B2022.2.pdf/cef02c45-63c6-3e9a-dd1b-757149f8f7bf>
- **PowerClerk Video Guides:** https://support.cleanpower.com/powerclerk/video_guides/
- **Training Videos and this Presentation will be posted to the UI Website:**
<https://www.uinet.com/w/Contractor Resources and Training Videos>
- **Alternative Metering Request Form: Provided in the SoQ during application process:**
https://www.uinet.com/web/uinet/suppliers_and_partners/service_and_resources/renewable-energy-solutions-meter-request-form
- **Link to Metering Diagrams:**
<https://www.uinet.com/documents/1678076/1703612/UI-Wiring-Diagrams-083121.pdf/e37d06bc-678f-9b30-fb78-0fb0d6561639>