



PowerClerk Applicant Training Guide

5/15/2023



PowerClerk Overview

PowerClerk as an application portal for
CORE Electric Cooperative

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

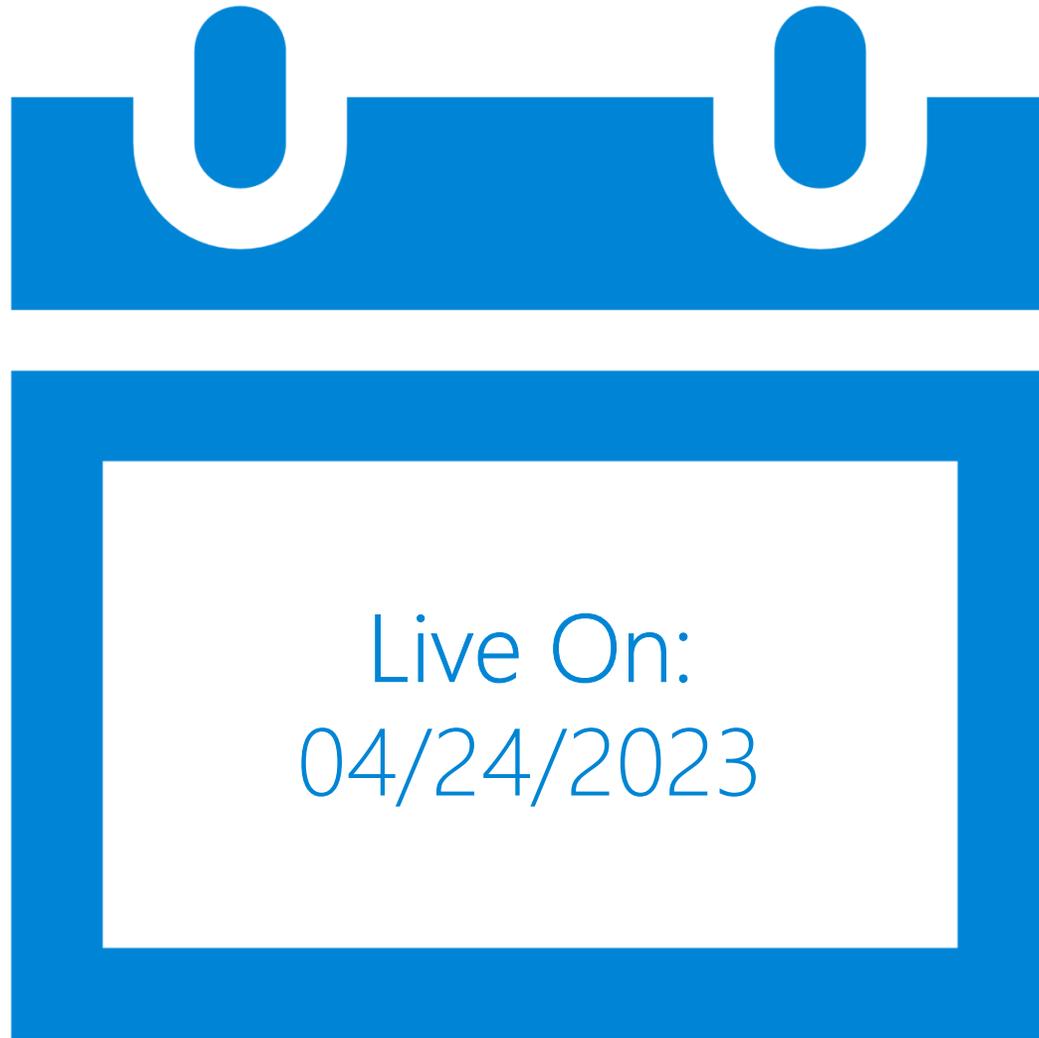
Navigating between multiple projects

Available Forms

Additional forms available through the
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Requiring Support

How to ask a question when using
PowerClerk



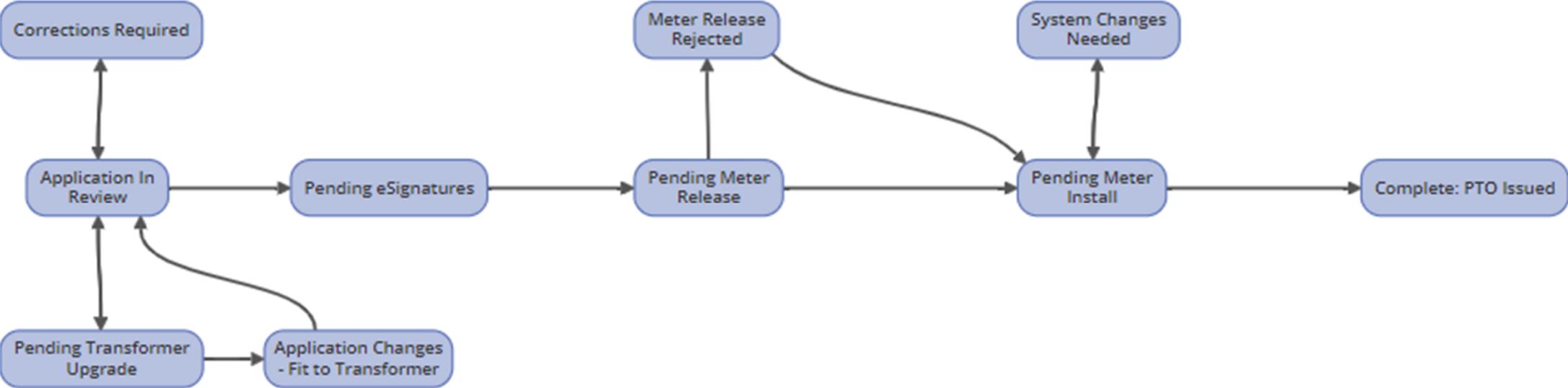
PowerClerk Overview



PowerClerk is the online application portal for CORE Electric Cooperative and will be used to:

- Create and submit new Tier 1 Interconnection Applications
- Monitor the progress of Tier 1 Interconnection Applications
- Send and receive notifications about project/application status and updates
- Submit all Interconnection Application related information

CORE Electric Cooperative PowerClerk Process Overview



Account Registration

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

New to PowerClerk?

Step One

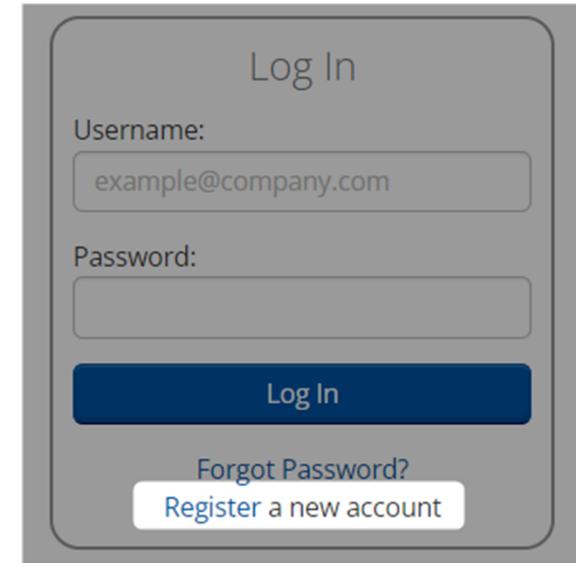
- Navigate to the PowerClerk link posted directly on your Utility's website

Step Two

- Select 'Register a New Account'

Step Three

- Under Role, select '**Applicant**' to submit applications



A screenshot of a login form titled "Log In". It features two input fields: "Username:" with the placeholder text "example@company.com" and "Password:". Below the fields is a dark blue "Log In" button. At the bottom, there are two links: "Forgot Password?" and "Register a new account".

Roles And Programs

Role: *

This field is required.

 I'm not a robot 
reCAPTCHA
Privacy - Terms

Already have a PowerClerk Account?

Step One

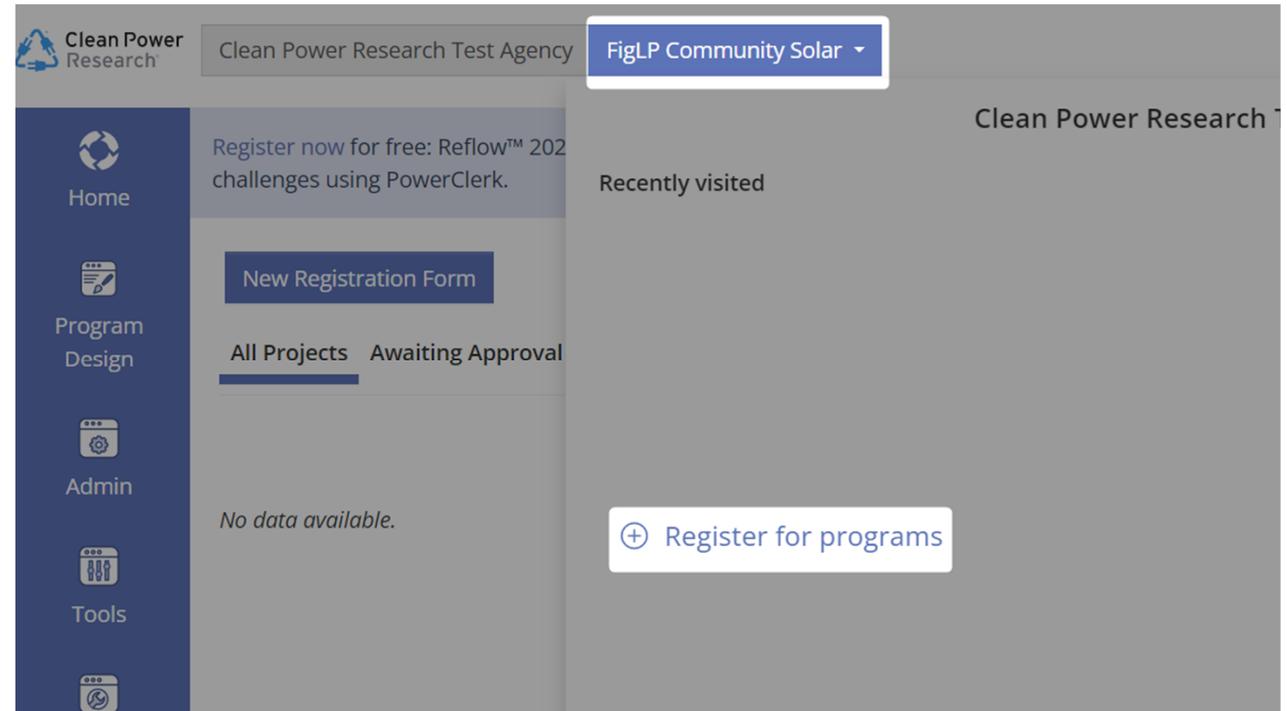
- Log Into your PowerClerk account. Any PowerClerk account will do.

Step Two

- Select the current program at the top left then select select "Register For Programs".

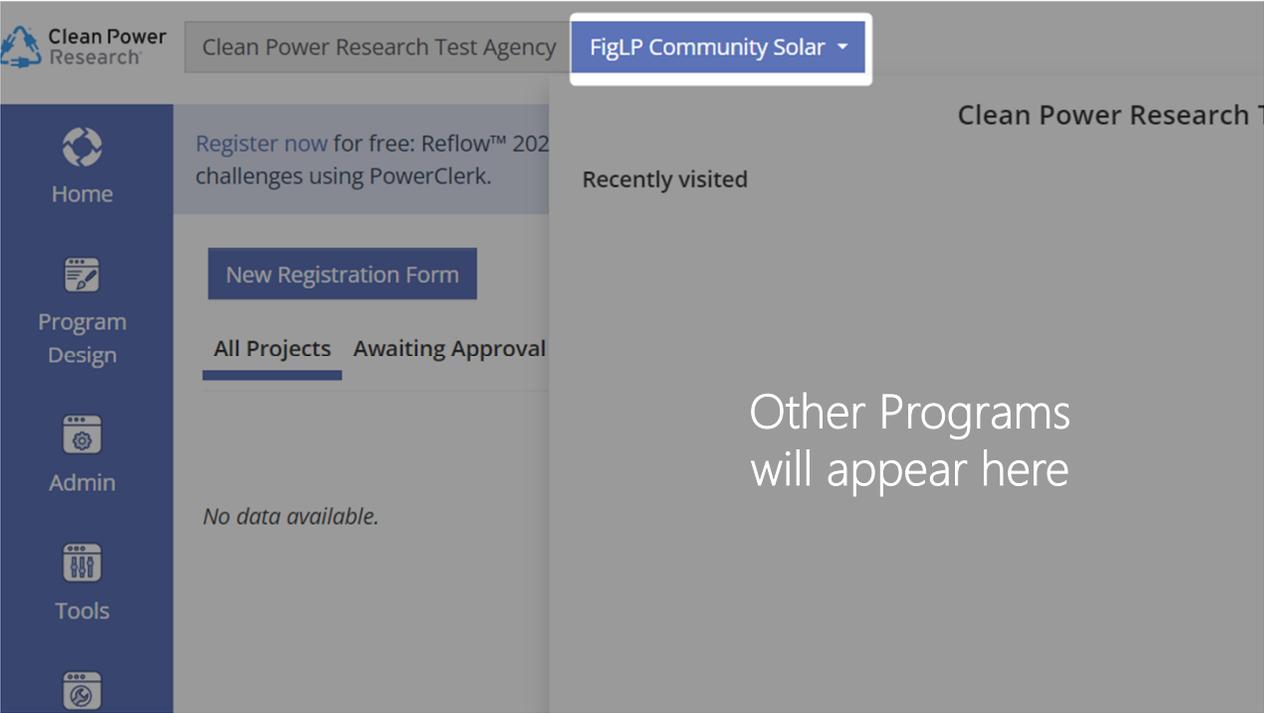
Step Three

- Under "Program to Add" select Agency: "CORE Electric Cooperative", Program: "DER Interconnection"



Navigating PowerClerk Programs

Select the current program dropdown at the top left of the screen to switch between all programs added to your account.

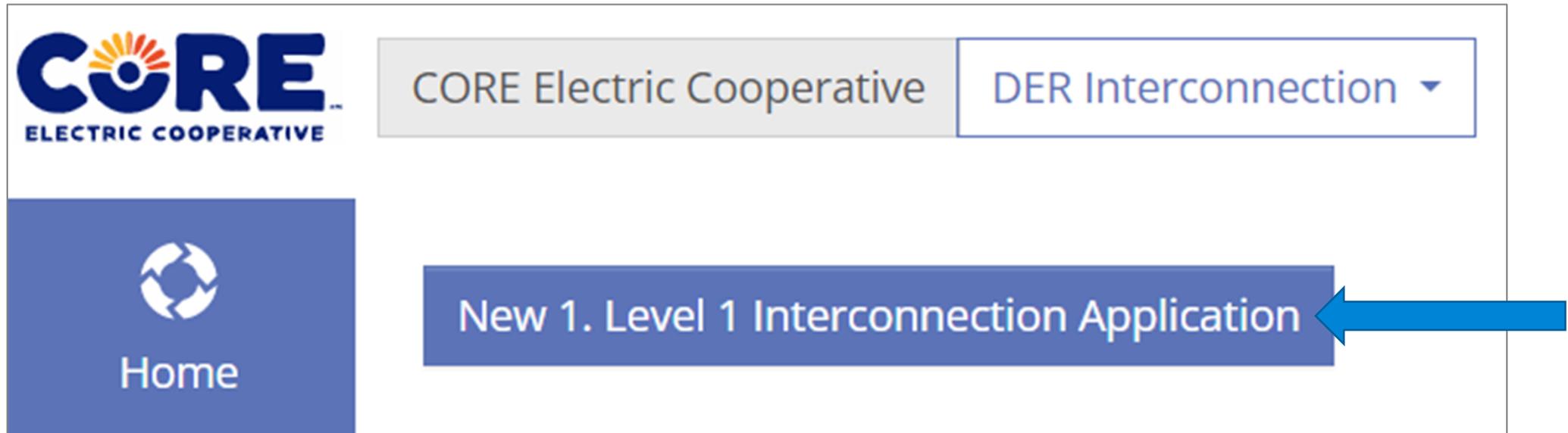


Application Process

New Applications

Upon logging into PowerClerk you will see a blue button at the top of your screen.

Click the “New 1. Level 1 Interconnection Application” button at the top of the PowerClerk screen to begin your new application.

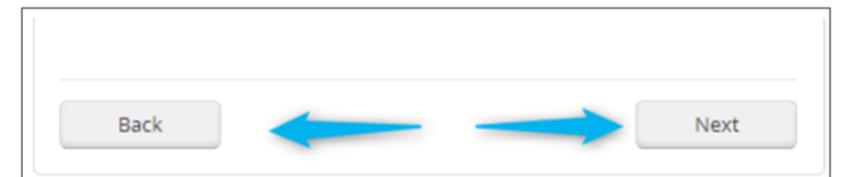
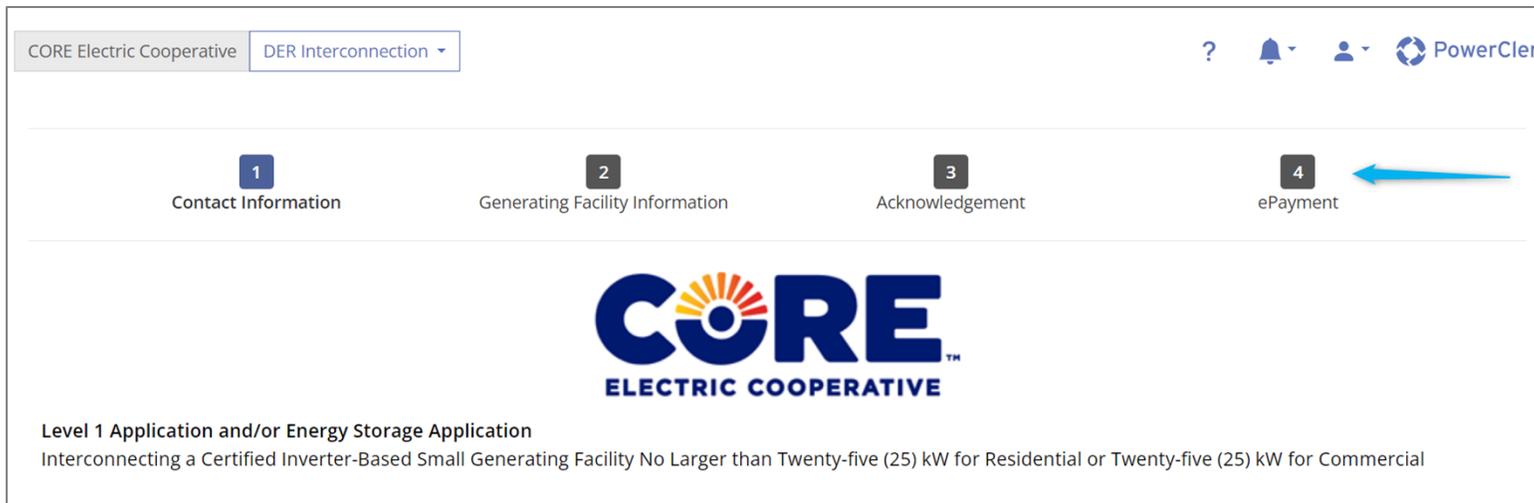


Application Navigation

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 and pay** for the application, click the blue "Proceed to Payment" 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 and re-submit.

I acknowledge that if I submit revisions to the design after CORE Electric's approval of the application, I will forfeit the application fee, and have the current application cancelled/withdrawn. I acknowledge that I will have to submit a new application and pay the application fee again. *

I have fully read, acknowledge, and agree to the above Terms & Conditions. *

[Back](#) [Proceed to Payment](#)

Unable to Submit Form

Please fix the errors below and try again.

Missing Required Fields:

- "I have fully read, acknowledge, and agree to the above Terms & Conditions." checkbox - [Page 3](#)

PowerClerk Home / Project Page

Navigating Through Projects

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**.

The screenshot displays the PowerClerk Home Screen interface. At the top, there is a blue button labeled "New 1. Level 1 Interconnection Application". Below this, a navigation menu includes "All Projects" (which is underlined), "Application Review", "Pending Signatures", "Pending Meter Release", "Meter Release Hold", and "Pe". Further down, there are links for "PTO Issued" and "Cancelled/Withdrawn/Denied". A search bar on the right is labeled "Search All Column". Below the search bar is a table with the following columns: "Project #", "Current Status", "Address", "Zip Code", "Applicant First", and "Applicant Last". The table contains one row with the following data: "INT-00024", "Pending Meter Install", "123 Test St", "98058", "John", and "Doe". Below the table, a button labeled "View/Edit Project" is highlighted with a blue arrow pointing to it from the right.

Project #	Current Status	Address	Zip Code	Applicant First	Applicant Last
INT-00024	Pending Meter Install	123 Test St	98058	John	Doe

PowerClerk Project Landing Page

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

Milestones: Blue highlighted chevrons below your project number indicate what milestone your project is currently in.

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

View/Edit: INT-00024

> Current Status

∨ Project Summary

Homeowner First Name	Homeowner Last Name	Homeowner Address	Homeowner Zip Code
John	Doe	123 Test St	98058

PV System: Nameplate Rating [kW]
5,475

> Available Forms

> Previous Forms

> Ask a Question Threads

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.

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

> Current Status			
∨ Project Summary			
Homeowner First Name	Homeowner Last Name	Homeowner Address	Homeowner Zip Code
John	Doe	123 Test St	98058
PV System: Nameplate Rating [kW]			
5.475			
∨ Available Forms			
Form Name			▲▼ Form Status ▲▼
1. Level 1 Interconnection Application	Edit	View	Submitted Last submitted on 4/5/2023 at 4:25 PM
Voluntary Withdrawal (Optional)	Begin		New Form Became available on 4/5/2023 at 5:01 PM

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.

Making Changes/Requested Revisions To Projects

Additional Project Forms In PowerClerk

How to make changes to projects before they are reviewed by CORE

- Depending on the status of your application certain forms will become available for the applicant to fill out and submit. If you need to make changes to a submitted application, you may make changes to the project if and only if the current status of said application is in the 'Pending Review' state. Once the status has changed to 'Application In Review', you must wait for the application to be marked for revisions by the reviewer. You will receive an email notification when the project has returned for corrections. While the project is in 'Pending Review' state, the form "Make Changes to Application (Optional)" will be available under the 'Available Forms' section. Select "Begin", next to your form to complete. Follow the directions at the bottom of the form "Make Changes to Application" to see what the next steps are.

- Forms **must be completed and submitted** to move your project along its workflow.
- Forms designated with (Optional) at the end are optional forms the applicant may fill out at different stages of the project lifecycle.

The screenshot displays a project management interface. At the top, a horizontal workflow diagram consists of six chevron-shaped boxes: 'In Review' (highlighted in blue), 'Awaiting Application Changes', 'Pending eSignatures', 'Pending Meter Release Approval', 'Pending Meter Installation', and 'Complete: PTO Issued'. A red arrow labeled 'Current Status' points to the 'In Review' box. Below the diagram, the interface is divided into sections: 'Current Status' (with a dropdown arrow), 'Project Summary', and 'Available Forms'. The 'Current Status' section shows the status is 'Pending Review' as of 5/8/2023 at 3:35 PM, with creation and update timestamps. The 'Project Summary' section includes fields for Homeowner First Name, Last Name, and Address, and a PV System Nameplate Rating of 6 kW. The 'Available Forms' section lists three forms: 'Assign Reviewer', 'Make Changes to Application (Optional)', and 'Voluntary Withdrawal (Optional)'. Each form has a 'Begin' button and a 'Form Status' of 'New Form' with a timestamp of 5/8/2023 at 3:35 PM. A red arrow points from the 'Make Changes to Application (Optional)' form to a red text box at the bottom right.

Current Status

▼ Current Status

Status marked as Pending Review on 5/8/2023 at 3:35 PM Project Owner:

Created on 5/8/2023 at 2:01 PM (2 days ago)

Last Updated on 5/8/2023 at 3:35 PM (2 days ago)

▼ Project Summary

Homeowner First Name	Homeowner Last Name	Homeowner Address	Homeowner Phone

PV System: Nameplate Rating [kW]

6

▼ Available Forms

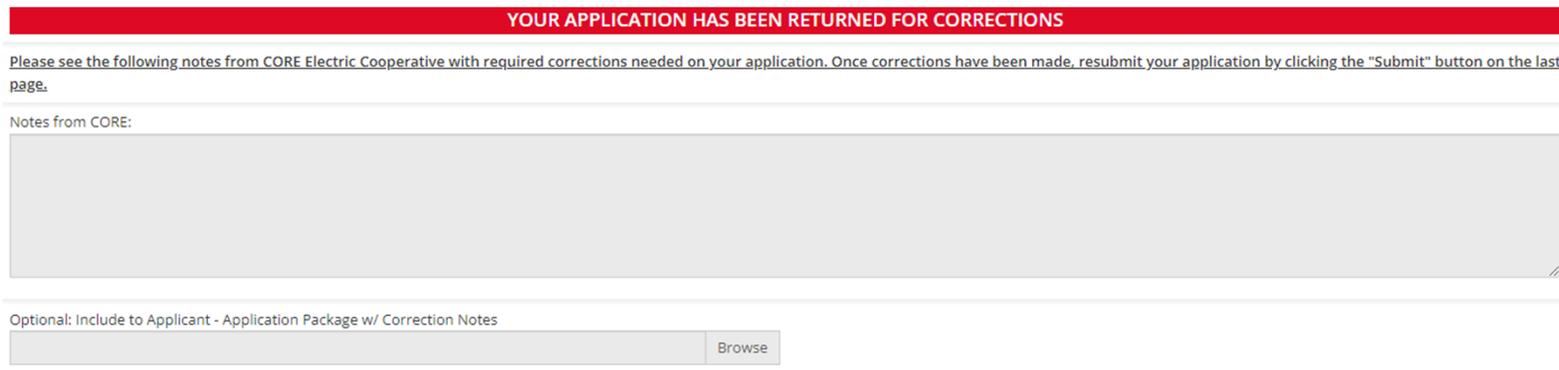
Form Name	Form Status
Assign Reviewer	New Form Became available on 5/8/2023 at 3:35 PM
Make Changes to Application (Optional)	New Form Became available on 5/8/2023 at 3:35 PM
Voluntary Withdrawal (Optional)	New Form Became available on 5/8/2023 at 3:35 PM

Applicants can use this form as long as the current status is "Pending Review" as shown above.

How to make changes to projects that are marked for corrections

Once the status of the project has changed to 'Application In Review', you must wait for the application to be marked for revisions by the reviewer (you can always use the ask a question feature to send a message to let us know if there is a correction needed so we can include this in our notes for revisions). You will receive an email notification when the project has returned for corrections. When the project has been returned for corrections, the form "Level 1 Interconnection Application" will be available. Click "Edit" to open the form. At the top of the form, you will see the image below at the top of it. Please read this information, as it tells you what needs to be corrected (same information in the email notification). It also includes the steps you as the applicant need to complete in order to submit the form for another review.

Forms must be completed and submitted to move your project along its workflow.



YOUR APPLICATION HAS BEEN RETURNED FOR CORRECTIONS

Please see the following notes from CORE Electric Cooperative with required corrections needed on your application. Once corrections have been made, resubmit your application by clicking the "Submit" button on the last page.

Notes from CORE:

Optional: Include to Applicant - Application Package w/ Correction Notes

Browse



Granting Access to Projects

How to Grant Teammates Access to your PowerClerk Projects

Granting Individual Project Access

A project grant gives a user access to a particular project in PowerClerk.

- You can provide individual project access to a teammate from the **View/Edit** screen of your project.
- Scroll down to the “Access Grants for this Project” menu.
- Enter your teammates email address
 - Note: Your teammate will need to **register** for their own individual PowerClerk account first.
- Choose whether this teammate can view project information only (**Read Only**) or if you want them to have the ability to fill out forms (**Read/Write**)
- Select “Add Grant”

∨ Access Grants For This Project ?

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

Grantee Email Address:

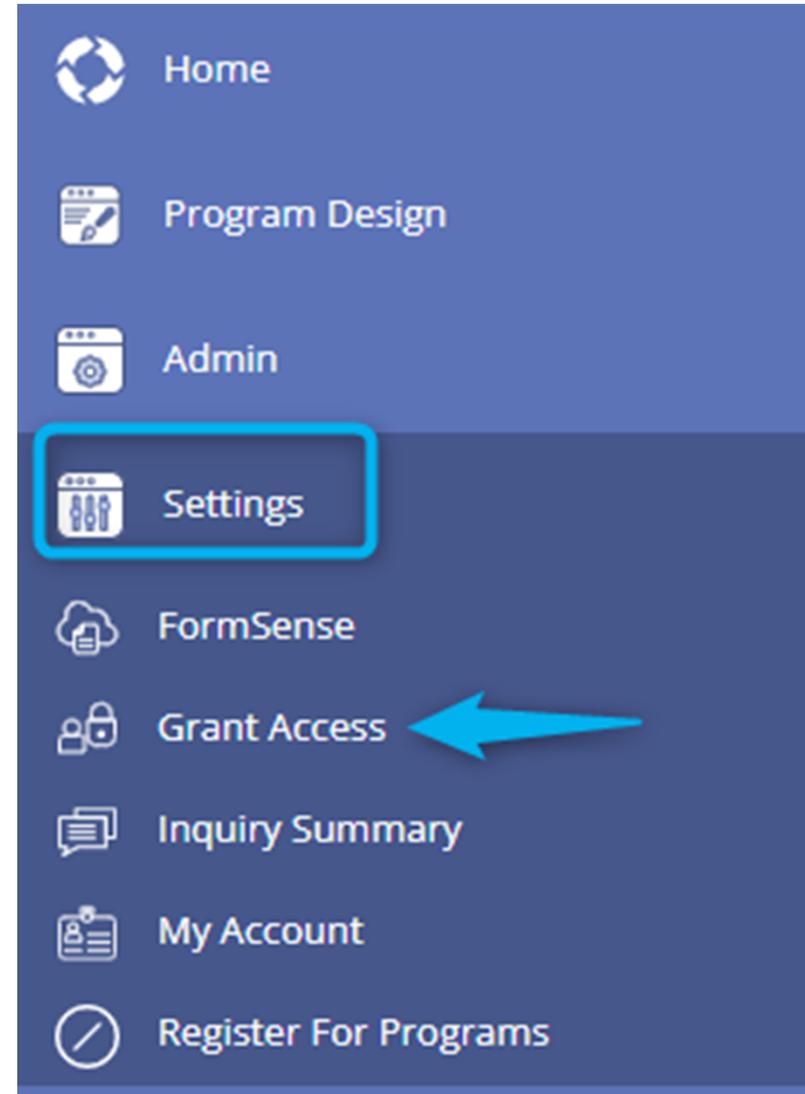
Read Only
 Read/Write

Add Grant

Granting Broad Project Access

Need one of your teammates to have access to **ALL** of your PowerClerk Projects?

- You can provide broad access to a teammate from the **Settings Menu** of PowerClerk.
- **Granting Broad Access** means that your teammate will have access to **EVERY** one of your PowerClerk projects as if they were there own.
- Select **"Grant Access"** and enter in your teammates email address.
 - Note: Your teammate will need to **register** for their own individual PowerClerk account first.
- Granting Broad Access will allow the grantee **Read/Write** privileges.



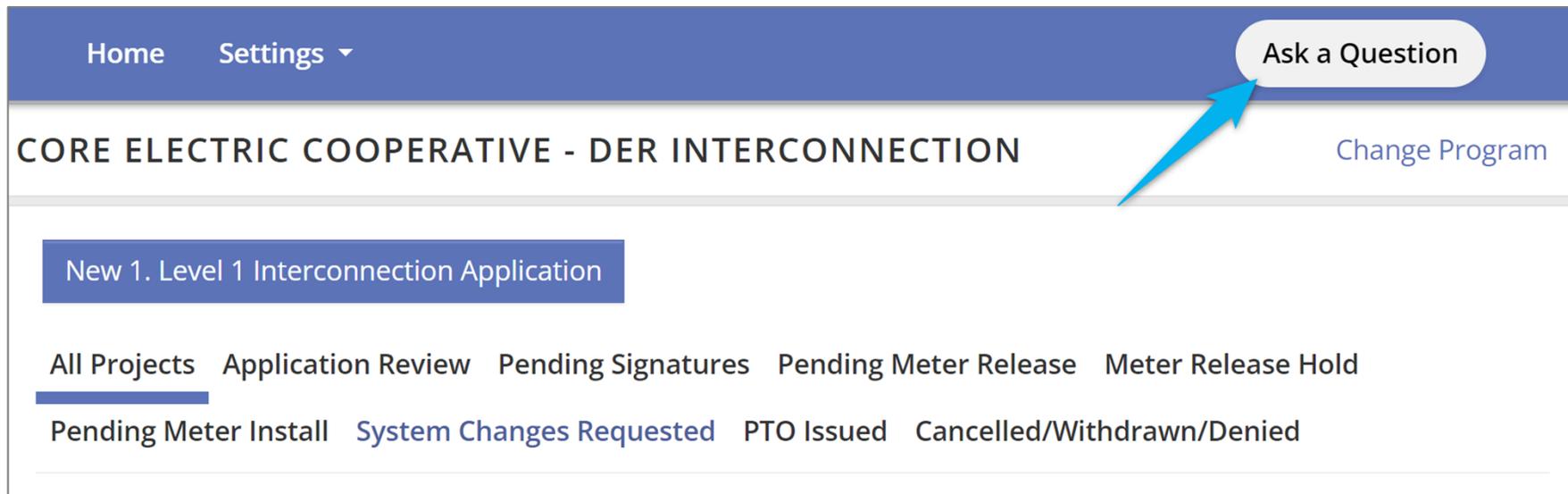
Need Help? "Ask A Question"

How to submit questions to CORE Electric Cooperative

How to Submit a Question to CORE Electric Cooperative

Select the “Ask Us a Question” button located on the top right of the PowerClerk screen to fill out and submit a project related question to CORE Electric Cooperative

Once CORE has responded to your question you will receive an email from PowerClerk directing you to navigate to the View/Edit page of your project.



How to View CORE Responses to Inquiries

You will be able to review responses from CORE under the "Ask a Questions" thread within your Projects 'View/Edit' page.

You may respond to CORE directly from PowerClerk by selecting "Add Reply".

The screenshot displays a sidebar menu on the left with the following items: 'Current Status', 'Project Summary', 'Available Forms', 'Previous Forms', and 'Ask a Question Threads'. The 'Ask a Question Threads' item is expanded, and a blue arrow points to it. Below the sidebar is a 'Select Inquiry:' dropdown menu with the selected option '001 - General - I need help'. The main content area shows two message threads. The first thread is from 'Melissa Applicant' on 5/28/2021 at 8:44 AM with the text 'What do I do next?'. The second thread is from 'Melissa - Administrator' on 7/22/2021 at 1:10 PM with the text '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.' At the bottom right of the interface, there is a blue button labeled 'Add Reply', with a blue arrow pointing to it.