

PowerClerk User Guide

for

Small Generating Interconnections and Backup Energy Connection Applications

Revision 1.2
11/02/23

Revision Date	Description of Changes	Revision
8/07/2023	Initial Release	1.0
8/09/2023	Updated figures. Included additional application page for amperage increase, export limiting control values and other features.	1.1
11/02/2023	Updated Backup Energy Application process. Added section on pending transformer upgrades.	1.2

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Welcome!

CORE Electric Cooperative's PowerClerk tool allows an easy way for customers and installers to submit a small generating interconnection, and/or backup energy connection, and view updates on its progress throughout the CORE Electric Cooperative interconnection process.

The following guide will help you complete the application correctly and includes other important information about CORE Electric Cooperative's interconnection requirements. Please note that not all interconnection requirements are provided in this guide or the PowerClerk tool. **You will need to reference the Small Generating Interconnection Guidelines, and the Small Generating Interconnection Procedures.**

Accessing / Register for PowerClerk

The CORE Electric Cooperative portal is located at coresgi.powerclerk.com

Instructions for new users on how to register can be found on the Login Page.

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Welcome to CORE Electric Coop's Level 1 Small Generating Interconnection and Backup Energy Connection Application Program

This application process is for Level 1 small generation interconnection requests (under 25kW AC), as well submitting an application for generators and battery storage only for backup power. If you are wanting to apply as a Level 2 or Level 3, please visit our website, see below, for the appropriate application and process.

[CORE Electric Cooperative Generation Interconnection](#)

Please take time to review CORE's 'SGI Procedures (SGIP)' and 'SGI Guidelines (SGIG)', which can be found at the links below.

- [Small Generating Interconnection Procedure](#)
- [Small Generating Interconnection Guidelines](#)

This document is updated regularly to include helpful information on navigating PowerClerk, including making changes on your own, making changes when corrections are requested, etc.

- [PowerClerk User Guide](#)

If you are a new user to PowerClerk, please click on 'Register' a new account, which can be found below the login button. Follow the instructions and you will be automatically registered for CORE Electric Cooperative's SGI Program.

Log In

Username:
example@company.com

Password:

Log In

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

Figure 1: Welcome Page

If you are a new user to PowerClerk, please click on 'Register', seen in the image below. By completing the instructions that follow, you will automatically be registered for CORE Electric Cooperative's SGI Program.

The image shows a 'Log In' form. It has a 'Username:' label followed by a text input field containing 'example@company.com'. Below that is a 'Password:' label followed by a password input field. A blue 'Log In' button is positioned below the password field. At the bottom of the form, there are two links: 'Forgot Password?' and 'Register a new account'. A red arrow points to the 'Register a new account' link, which is also circled in red.

Figure 2: Register For New Account

Once you are registered, either as new user of PowerClerk or an existing user of PowerClerk, but new to CORE's SGI Program, the home page will appear as below.

The image shows the 'HomePage View' of the application. At the top, there's a header with 'CORE Electric Cooperative' and a dropdown menu for 'SGI Application'. Below the header, there are two main tabs: 'New Level 1 Interconnection Application' and 'New Backup Energy Connection Application (Generator and Battery Storage Only)'. Under these tabs, there's a row of project status filters: 'All Projects', 'Pending Review', 'Pre-Approval Queue', 'Application Review', 'Pending Transformer Upgrade', 'Applicant Resizing To Fit Transformer', 'Pending Signatures', and 'Pending Meter Release'. Below the filters, there's a search bar labeled 'Search All Project Data'.

Figure 3: HomePage View

Homepage

Grant Access to All Projects

If you want to share access to all projects with another user, like another company employee, click on "Tools" located on the blue bar located on the left-hand side of the Homepage, then select "Grant Access".

The image shows the 'Tools' menu on the left-hand side of the homepage. The menu is a vertical blue bar with icons for 'Home', 'Program Design', 'Admin', and 'Tools'. The 'Tools' icon is circled in red. To the right of the 'Tools' icon, a dropdown menu is visible, containing the following options: 'FormSense', 'Grant Access', 'Inquiry Summary', and 'Register For Programs'. The 'Grant Access' option is also circled in red.

Figure 4: Project Wide Grant Access

When the “Grant Access” window opens, click the button “Grant Access”.

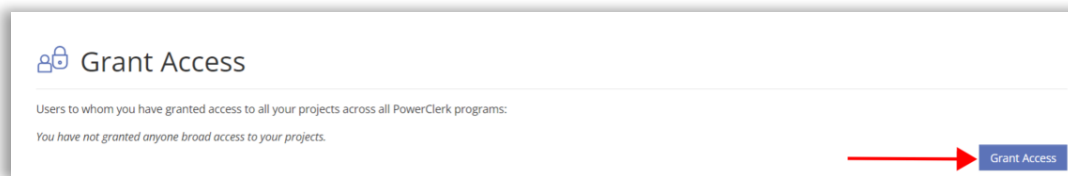


Figure 5: Add/View Grant Access

Once the “Grant Access” pop up window opens, enter the email address of whom you are sharing access with, and click “OK”.

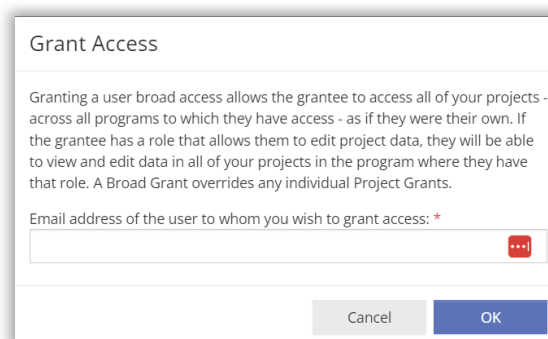


Figure 6: Add Grantee Access

The user with that email will now have access to all projects that you as the project owner (PowerClerk user) submits. If multiple people within your company use PowerClerk to submit projects, each PowerClerk user will need to follow the same steps to grant project wide access.

FormSense

FormSense is an auto-complete aid that can pre-fill information that is common to all applications. To get started, click on “Tools”, located on the blue bar, left-hand side of Homepage, then select “FormSense”.

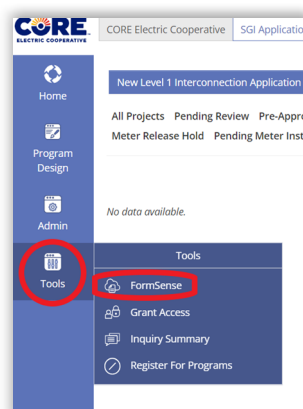


Figure 7: FormSense Access

Select the form(s) “New Level 1 Interconnection Application” or “New Backup Energy Connection (Generator and Battery Storage Only)” and click the “Edit My Defaults” button.

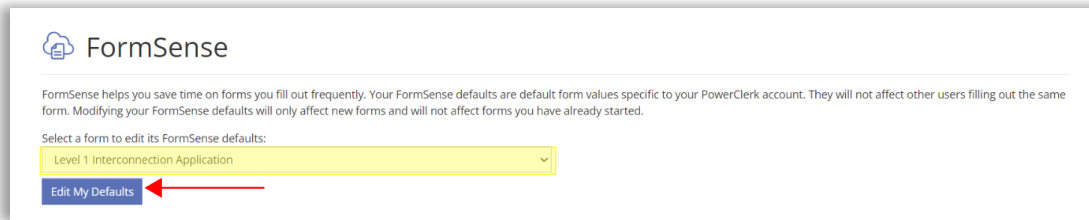
The image shows the FormSense interface. At the top, there's a header with the FormSense logo and a brief description of its purpose. Below this, there's a section titled "Select a form to edit its FormSense defaults:". A dropdown menu is open, showing "Level 1 Interconnection Application" as the selected option. Below the dropdown, there is a blue button labeled "Edit My Defaults". A red arrow points from the right towards this button.

Figure 8: Edit FormSense Details

Select the form you wish to enter in the default information that is common to all applications (e.g., Contractor Contact Information, Company Name).

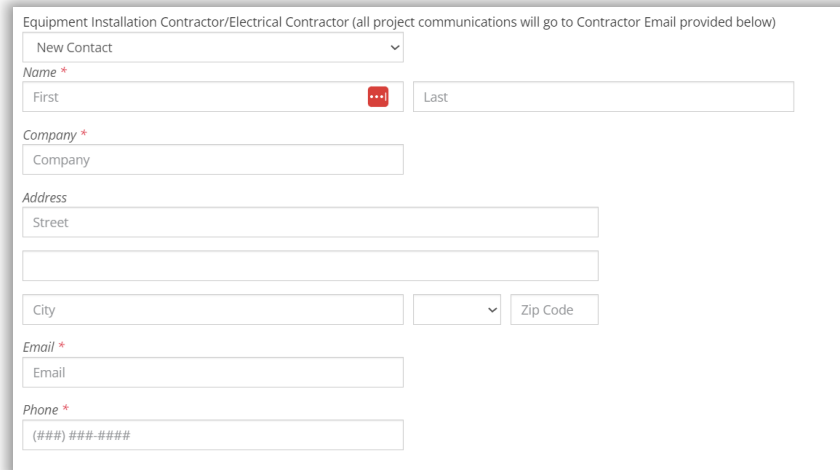
The image shows a form titled "Equipment Installation Contractor/Electrical Contractor (all project communications will go to Contractor Email provided below)". The form contains several input fields: a dropdown for "New Contact", "Name" fields for "First" and "Last", a "Company" field, "Address" fields for "Street", "City", and "Zip Code", an "Email" field, and a "Phone" field with a placeholder "(###) ###-####". There are red asterisks next to "Name", "Company", "Email", and "Phone" indicating required fields.

Figure 9: Contractor/Installer Contact Information

Click the “Next” button as you complete each page, and then click the “Save FormSense Defaults” button when finished. **Note: FormSense should only be set up for the two application forms mentioned above.**

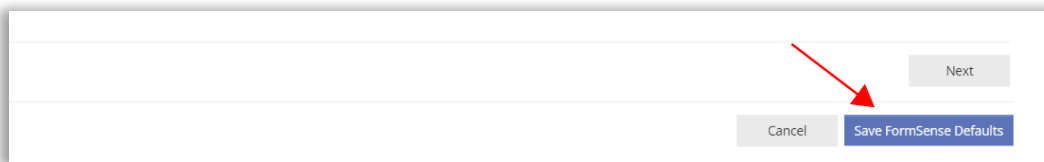
The image shows the bottom of a form. There are three buttons: "Next", "Cancel", and "Save FormSense Defaults". The "Save FormSense Defaults" button is highlighted in blue. A red arrow points from the top right towards this button.

Figure 10: Save FormSense

Inquiry Summary

All inquiries that are submitted using the “Ask a Question” button can be viewed collectively within the “Inquiry Summary” page. To view this, click on “Tools”, located on blue bar on the left-hand side of the Homepage, then

select “Inquiry Summary”. Clicking the arrow next to each row will show all inquiries and responses to and from project owner (PowerClerk user to submit applications) / CORE PowerClerk administrators.

View / Edit Page

For specific details about a project (while viewing the list of projects via the Homepage), click the arrow to the left of the project number and then click the “View/Edit Project” button. The project’s “View/Edit” details page is where you will be able to see the status of the project, view or submit project forms, view any “Ask a Question” threads, and view other important information. At the top of the View/Edit page, you will see the Milestones for the solar application process. The Milestones include from the time of submission through issuing a Permission To Operate (PTO).

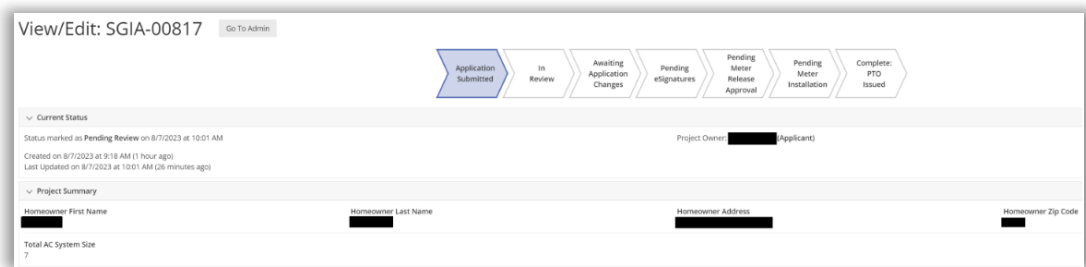


Figure 11: Project View Page (Project Landing Page)

Current Status

At the top of the View/Edit page is a project workflow diagram indicating the milestone status of the project. Additional status details are also shown under the Current Status section. The contractor/project owner is expected to regularly check the status of the project and to provide information when necessary.

Available Forms

The Available Forms section includes forms that need to be completed with information about the project unless it is noted with optional in parentheses at the end of the form name. Select “Begin” to enter information within a new form. Continue an existing unsubmitted form by selecting the “Continue” button. After the form is submitted, the project status will update to the next appropriate workflow step and CORE personnel will be notified of the submitted updates.

Optional Forms

The forms with optional in the name, are optional forms to be filled out with additional information you think CORE may need (CORE may ask for additional information) or want. These forms include additional upload slots and text boxes to provide additional notes.

Downloadable Documents (As Available) Form

This form is where you will be able to download important documents as they become available. Currently, the documents you will be able to download are as follows:

- Level 1 Interconnection Application – Unsigned
- Level 1 Interconnection Application – Signed (AHJ wants this copy)
- Purchase Power Agreement (PPA) – Signed (Qualifying Facility (QF) applications only)

- Standard Small Generating Interconnection Agreement (SSGIA) – Signed (Qualifying Facility (QF) applications only)
- PTO Certificate

Previous Forms

The Previous Forms section includes forms that were previously submitted.

Ask A Question

This section allows you to review your specific project questions provided through the “Ask a Question” button. If you have multiple threads, you will be able to change the thread via the dropdown menu.

Access Grants For This Specific Project

Since the project owners (PowerClerk user submitting the application), is submitting the project application on behalf of the customer, the project owner can grant access to the customer. Granting access to the customer will allow them to closely monitor the progress of the application. To grant access, navigate to the View/Edit page. Under the “Access Grants For This Specific Project” section, enter the email address of the customer, select access permissions, and select the “Add Grant” button. Once, added, the customer will receive an email informing them of the project grant, and if a new user, will need to register for a new account to gain access to their project. This feature can also be used for anyone else in the company who may need access to projects.

Figure 12: Specific Project Grant Access

New Level 1 Interconnection Application – Interconnection Process

Starting The Application

1. From the Homepage, click the “New Level 1 Interconnection Application” button to begin the application process.

Figure 13: New Level 1 Interconnection Application Button

Contact Information

2. The application form is comprised of five (5) pages:
 - a. Contact Information

- b. Generating Facility Information
- c. Amperage Information
- d. Acknowledgment
- e. ePayment



Figure 14: Application Pages

- 3. Note the **Important Information** on Page 1

IMPORTANT INFORMATION:

- PowerClerk automatically saves your progress.
- Fields with a red * (asterisk) are **REQUIRED**.
- The blue (?) dots reveal helpful tips to guide you through the application.
- After you log out, you can log back in and pick up where you left off.
- Navigate using the buttons at the bottom of the page or the page boxes above.
- Click the "Submit" button at the end of the application to submit.
- Unsubmitted applications will be deleted after 30 days
- A \$195 Application Processing fee will be collected upon submission of this application
- [SGI Procedures](#)
- [SGI Guidelines](#)
- [PowerClerk Applicant Training Guide \(updated 6/20/23\)](#)

Figure 15: Important Information Level 1 Interconnection Application

Note: Some fields throughout the application process will not appear until a certain choice/answer is selected

- 4. The application begins with the customer information, customer's account number (if applicable), and the AHJ

Interconnection Customer Information (installation location)

Name *

First

Last

Company

Company

Address *

Street

City

v

Zip Code

Email *

Email

Phone *

(###) ###-####

Is the homeowner an existing CORE Electric Cooperative member? *

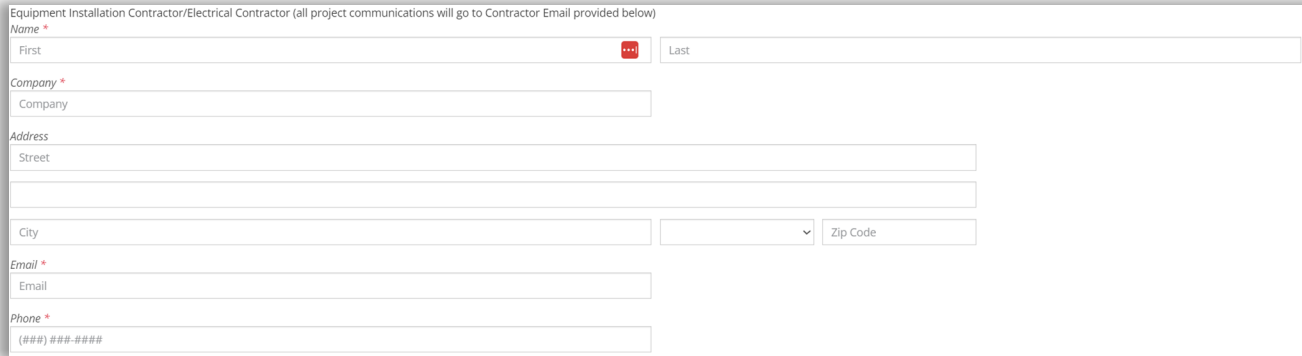
☐ Yes
 ☐ No

CORE Electric Cooperative Account Number: *

Local Building Department - AHJ *

Figure 16: Customer Contact Information

- Next, enter the equipment installation Contractor/Electrical Contractor information which will need to be filled out. **Note: The email listed here is where all communications will be sent in addition to the customer(homeowner) and project owner (PowerClerk user submitting the application)**



Equipment Installation Contractor/Electrical Contractor (all project communications will go to Contractor Email provided below)

Name *

First Last

Company *

Company

Address

Street

City Zip Code

Email *

Email

Phone *

(###) ###-####

Figure 17: Contractor/Installer Contact Information

- Click “Next” when you are ready to proceed to the next page.

Generating Facility Information

This page is where you, as the applicant, will fill out the necessary information about the PV system, ESS (if applicable), and upload required attachments for CORE to complete the review of the application.

Small Generating Facility Information

- Page 2 begins with the application type of service at the site (Net-Metering/Qualifying Facility and Commercial/Residential). Certain restrictions apply depending on the answer combination provided.



Net Metering or Qualifying Facility (QF) *

Net Metering

Select...

Net Metering

Qualifying Facility (QF)

Commercial or Residential? *

Commercial Customer

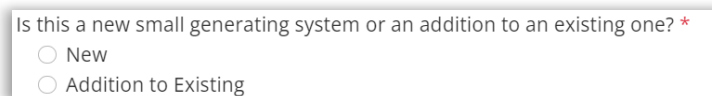
Select...

Commercial Customer

Residential Customer

Figure 18: Net-Metering/Qualifying Facility and Commercial/Residential

- Choose if this is a new or addition to existing system.



Is this a new small generating system or an addition to an existing one? *

☐ New

☐ Addition to Existing

Figure 19: New or Existing Generating System

- a) If 'New', skip to number (fill in number later)
- b) If 'Addition to Existing', do you know the existing PV Specifications?

Do you know the existing PV specifications? *

☐ No

☐ Yes

Figure 20: Known Existing PV Specifications

- c) If 'Yes', enter the PV Specifications:
 - Specify the Inverter: quantity, manufacture and model
 - Specify the PV Array: quantity, manufacturer and model
 - Enter the Tilt, Azimuth, and Tracking of the array
 - Tracking is fixed, single-axis or dual-axis
 - Enter the Shading values for each month as a percentage of solar access, where blank or 100 specifies no shading.
 - If an additional inverter or array is needed, click on either Add Inverter or Add Array
 - Press the Calculate button to determine the PV DC rating and Inverter AC rating

Existing PV System Specification *

Inverter

Qty

1

Tesla

11.5 kW Powerwall 3 Inverter (Component)

Efficiency Rating: 0.970

PV Array [Delete Array](#)

Qty

25

Tesla

400W (Model T400H)

PTC Rating: 0.3715

Tilt

25

(0° to 90°)

Azimuth

180

(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
<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 30px; height: 20px;"></div>

Add Array

Add Battery

Add Inverter

System Rating: 10 kW DC / 9.009 kW CEC-AC

Inverter Rating: 11.5 kW AC

Estimated Annual Production: 16515 kWh

Total Nameplate Energy Capacity: 0 kWh

Calculate

Figure 21: Existing System PV Specifications

- d) If 'No' (you do not know the existing PV specifications), enter the existing system size AC (Inverter Nameplate Rating or Export Limit Set Point):

Existing System Size AC [kW] (Inverter Nameplate Rating OR Export Limit Set Point): *

Figure 22: Existing System Inverter AC Rating

2. Select the Generation Type and whether you are adding an energy storage system

New Generating System Type: *

☐ Solar

☐ Other (Wind, Hydro, etc)

Will you be adding new Energy Storage to the system? *

☐ Yes

☐ No

Figure 23: Generating Type and ESS

- a. If adding an energy storage system, select whether the system will be AC/DC coupled. Depending on the selection, pay attention to the notice that pops up explaining where to include it.

Will the energy storage system be AC coupled or DC coupled? *

☐ AC

☐ DC

NOTICE: Please see below for the proper location to include the energy storage system.

For New Solar Systems with a DC Coupled Battery: Please use the "Add Battery" button in the "PV System Specification" below.

NOTICE: Please see below for the proper location to include the energy storage system.

For Addition of an AC Coupled Battery: Please use the "Energy Storage System" selector in the "Energy Storage Information" section further down this form. DO NOT use the "Battery" button if you selected "Solar" as the system type.

Figure 24: AC or DC Coupled ESS

- b. If selecting "Solar", enter the PV specifications
- Specify the Inverter: quantity, manufacture and model
 - Specify the PV Array: quantity, manufacturer and model
 - Enter the Tilt, Azimuth, and Tracking of the array
 - Tracking is fixed, single-axis or dual-axis
 - Enter the Shading values for each month as a percentage of solar access, where blank or 100 specifies no shading.
 - If an additional inverter or array is needed, click on either Add Inverter or Add Array
 - Press the Calculate button to determine the PV DC rating and Inverter AC rating

PV System Specification: *

Inverter

Qty 1 Tesla 7.6 kW (Model 1538000-xx-y (240V) - may |

Efficiency Rating: 0.980

PV Array Delete Array

Qty 25 Tesla 425W (Model T425S)

PTC Rating: 0.3970

Tilt Azimuth Tracking

18 180 Fixed

(0° to 90°) (0° to 359°)

Shading

% Solar Access (100 or blank = No Shading)

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

Add Array

Add Battery

Add Inverter

System Rating: 10.625 kW DC / 9.726 kW CEC-AC

Inverter Rating: 7.6 kW AC

Estimated Annual Production: 17018 kWh

Total Nameplate Energy Capacity: 0 kWh

Calculate

Figure 25: New PV System Specification

- c. If selecting "Other", enter the following details
1. Describe "Other" for
 2. Inverter Manufacturer
 3. Inverter Model
 4. Inverter Nameplate AC Rating or Export Limit Set Point
 5. PV System Size DC Rating
 6. PV System Size AC Rating
 7. Project Annual Energy Production

Please describe "Other" for Generating System Type: *

Inverter Manufacturer: *

Inverter Model: *

Inverter Nameplate AC Rating OR Export Limit Set Point [kW]: *

PV System DC Rating [kW]: *

PV System Size AC [kW]: *

Projected Annual Energy Production [kWh]: *

Figure 26: Other Generating System Type Info

- d. The following value will show you the total AC system size, which includes the existing system (Existing PV specs, or entered in Existing System Size), and the new generation type (PV specs or manually entered in the information).

Total AC System Size
7.60 kW

Figure 27: Total AC System Size

- i. Depending on the combination of your answers for whether this application is net-metering/qualifying facility (QF) and if it is a residential/commercial application, an export limiting box may appear if the value shown for “Total AC System Size” exceeds a threshold.

If using microinverters, the value for export limit cannot be different from the calculated inverter nameplate rating (qty * single microinverter AC rating). Microinverters do not have the option to control the export limit. Please reduce the quantity of your inverter system size.

Total Export Limit for all Generation Systems on Site (AC kW): *

Figure 28: Total Export Limit for all Generation Systems on Site

- ii. If the “Total Export Limit for all Generation Systems on Site” box appears, you will also be required to fill out how the inverter export limit is controlled.

How is the inverter export limit controlled? Does the customer have access to this feature? *

☐ Firmware / No

☐ Software / No

☐ Software / Yes

☐ Other

Figure 29: Inverter Export Limit Control

1. If “Other” is selected, please explain how it is controlled.

Please provide explanation of how inverter is limiting the export: *

Figure 30: Other Explanation Export Limit Control

- e. Select the service voltage for the location.

Service Voltage: *

☐ 120/240

☐ 120/208

☐ 277/480

Figure 31: Service Voltage

The next section of the application pertains to energy storage on site. More specifically, if there is existing energy storage or if the new energy storage is AC coupled (answered previously whether the ESS would AC/DC coupled).

- Is there existing energy storage on-site? *
- ☐ Yes
- ☐ No
-
- Existing Energy Storage Size [kW]: *
-
-
- Existing Energy Storage Size [kWh]: *
-

b. If you selected “Yes” for *Adding New ESS to the system* (see [Small Generating Facility Information](#) 9.a), you will be presented with the following option to enter the ESS information (AC Couple ESS only), enter the following details

- Proposed New Energy Storage System *

Integrated Energy Storage: [Delete Integrated Energy Storage](#)

Qty	2	Tesla	1707000-XX-Y
-----	---	-------	--------------

Maximum Continuous Discharge Rate (kW): 11.50
 Nameplate Energy Capacity (kWh): 13.50
 Battery Technology: Lithium-Ion

[Add Integrated Energy Storage](#) [Add Inverter and Battery](#)

Total Nameplate Energy Capacity: 27.00 kWh
 Total Max. Continuous Discharge Rate: 23.00 kW

[Calculate](#)

c. If you selected "Other" for *New Generating System Type* (see [Small Generating Facility Information](#) 9.c) and the ESS is DC Coupled, enter in the following details

- 
- CORE**
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- ESS Inverter Model
- Energy Storage Size (kW)
- Energy Storage Size (kWh)

Required Attachments

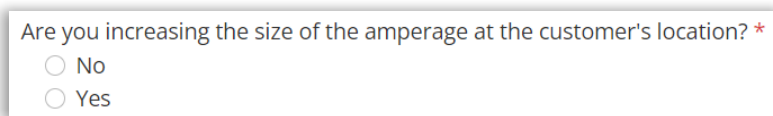
The last section on the Generating Facility Information page requires attachments to for CORE to complete the application review. Here the applicant, will upload three (3) required documents: One-Line Diagram, Site Plan, and Specification Sheets for Modules, Batteries, and Inverters

A One-Line diagram should be one (1) page in total, as should the Site Plan. For the specification sheets (Modules, Batteries, and Inverters), please combine all the sheets into one PDF. This is very important as the document generation for DocuSign has a file size limit. **Note: Failure to adhere to the directions can lead to delays in processing your application as DocuSign will not be able to send the required documents for the customer/homeowner's required signature.**

Amperage Information

This page of the application asks whether you are upgrading the customer's service amperage.

4. Select "Yes" or "No" for whether you are increasing the service amperage at the customer's location



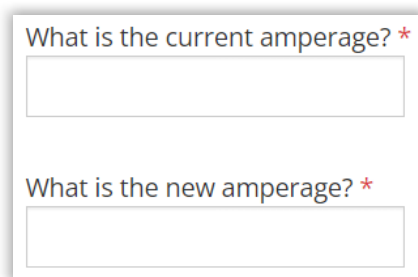
Are you increasing the size of the amperage at the customer's location? *

☐ No

☐ Yes

Figure 34: Service Amperage

- a. If "No", please click the "Next" button at the bottom of the page
- b. If "Yes", enter in the following details
 - i. Current Service Amperage
 - ii. New Service Amperage



What is the current amperage? *

What is the new amperage? *

Figure 35: Current & New Service Amperage Values

Terms & Conditions and Acknowledgements

The last page of the application is the terms and conditions, and the acknowledgements. Please read this section carefully as it contains important information regarding the application fees, cancellations of applications/projects, etc. Both checkboxes acknowledging the terms and conditions, and changes to the application/project data are required to submit the application.

ePayments

This page is where you submit payment for the application fee. Currently, the only payment method accepted is by credit cards.

Application In Review

Each application, whether it is a Net-Metering/Qualifying Facility and Residential/Commercial will undergo a internal review by CORE personnel. At this point, CORE will determine whether any distribution upgrades will be required (e.g., transformer upgrade). If CORE determines no issues are present in the application, and no distribution upgrades are required, then CORE will request eSignatures from the homeowner (project/application will move to Pending Signature status). If CORE determines that issues are present in the application, the application will be marked for Corrections and will be returned to the contractor/project owner (see [Corrections Required](#)).

Awaiting Application Changes

Corrections Required

If CORE Electric Cooperative discovers any issues during its review of your submitted Level 1 Interconnection Application, an email will be sent to homeowner/contractor/project owner with CORE's notes stating what needs to be corrected. The email will also include a link to the project landing page for that specific project. The same form that you initially submitted, "Level 1 Interconnection Application", will be available in Project View (Project Landing Page) > Available Forms section. Click on either "Edit" or "Continue" to reopen the application form to make the necessary changes. At the top of the form, you will now see the image below, labeled Corrections Required, which will include CORE's notes on what needs to be corrected. The notes provided here are the same as the email that was sent to you notifying you of the changes but provided here for convenience. It is important to read this section carefully.

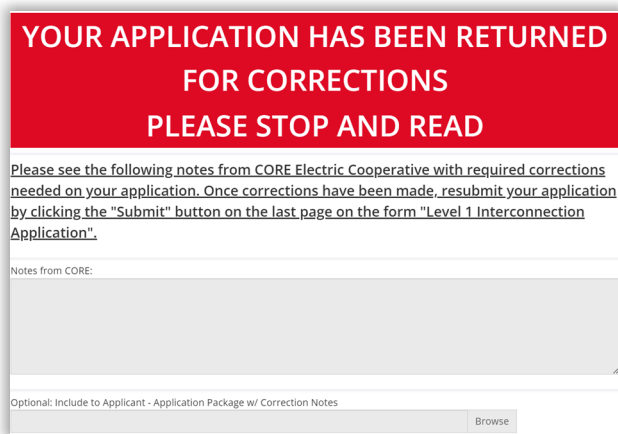
The image shows a screenshot of a web form. At the top, there is a red banner with white text that reads: "YOUR APPLICATION HAS BEEN RETURNED FOR CORRECTIONS PLEASE STOP AND READ". Below the banner, there is a paragraph of text: "Please see the following notes from CORE Electric Cooperative with required corrections needed on your application. Once corrections have been made, resubmit your application by clicking the 'Submit' button on the last page on the form 'Level 1 Interconnection Application'." Below this text is a section labeled "Notes from CORE:" followed by a large, empty text area for notes. At the bottom of the form, there is a section labeled "Optional: Include to Applicant - Application Package w/ Correction Notes" with a "Browse" button next to it.

Figure 36: Corrections Required Notice

Pending Transformer Upgrade

During CORE's review of the application, it will be determined whether the inverter system size submitted may exceed the transformer rating. If CORE determines that a transformer upgrade is necessary, you will be notified via email from PowerClerk. In this email, you will be notified of the next steps which involves our engineering services team and our distribution designers (they will reach out to the customer). This email will also include the max allowed size for the inverter you can have that will avoid the transformer upgrade. If a 0kW value is

shown, then there is no way to avoid a transformer upgrade. Our distribution designers will be in touch with the customer to discuss the options and schedule a site visit. They will also present options to the customer, such as, they will have the option to either accept the transformer upgrade, reduce the system size by changing the system entirely if limiting export control is not an option (microinverters), or you can limit the export value to max allowed size per the email.

Applicant Changes – Fit To Transformer

If the customer chooses to make changes to the application to avoid a transformer upgrade, you will find the form “Applicant Changes – Fit to Transformer” available under the Available Forms section. The form will open with the figure shown below, reminding you of the max allowed inverter system size, as the rest of the form will be the exact same as the initial Level 1 Interconnection Application. Complete this form and click “Submit” on the last page to submit the updated application.



Figure 37: Max Allowed Inverter System Size

Pending eSignatures

Given the type of application, Net-Metering or Qualifying Facility (QF), there will be at least one document for the homeowner to digitally sign. PowerClerk will notify the homeowner/contractor/project owner via email with what documents the homeowner will be required to digitally sign. If a net-metering application is submitted, the homeowner can expect to sign one (1) document via DocuSign, the Level 1 Interconnection Application. See Figure 23 for an example of the email from DocuSign that the homeowner should be on the lookout for. Depending on the email provider, the DocuSign email can go to the spam/junk folder. In this case, have the homeowner move the email from the spam/junk folder to their inbox as the link to view the document may not work if in the spam/junk folder.

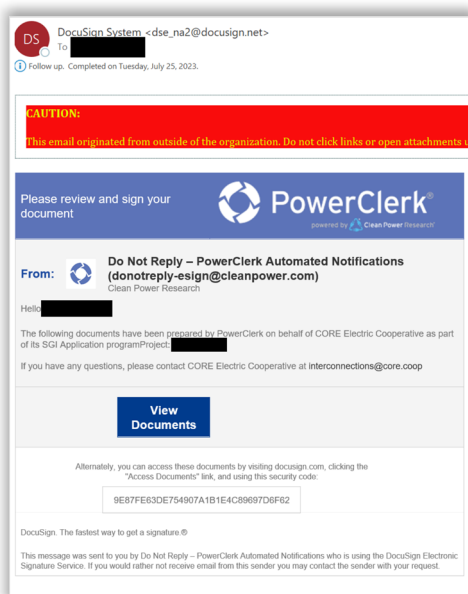


Figure 38: DocuSign Email Example

After the customer clicks on “View Documents” in the email, the customer will be presented with the following acknowledgment box from DocuSign. The customer ***must*** agree to DocuSign’s Terms and Conditions before they will be able to digitally sign the document.

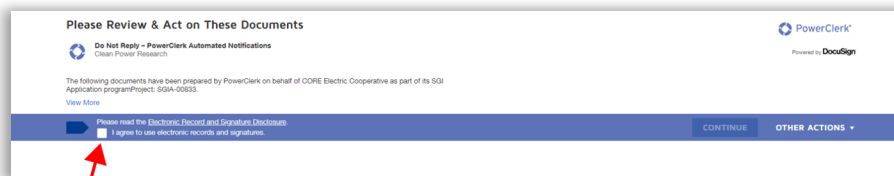


Figure 39: DocuSign Terms & Conditions

PPA & SSGIA eSignatures

If a qualifying facility (QF) application was submitted, the homeowner will have three (3) documents to sign via DocuSign. In addition to the Level 1 Interconnection Application, the homeowner will have to sign the Purchase Power Agreement (PPA), and the Standard Small Generating Interconnection Agreement (SSGIA). The DocuSign emails will be similar to example shown above, as well as having to agree to the terms for each DocuSign document.

Pending Meter Release Approval

Pending Meter Release

Once the eSignatures on all required documents from both parties (homeowner and CORE) have been completed, either the AHJ or contractor/project owner/solar company will be required to email a copy of the passed inspection notice to interconnections@core.coop. The approval date on the meter release cannot be dated before CORE’s approval date, which can be found in the email “Level 1 Interconnection Application eSignatures Complete - CORE Electric Cooperative - *****”. **Note: Do not upload a copy of this inspection to PowerClerk.**

Meter Release Rejected

CORE will not accept any meter release inspection dated prior to CORE’s approval of the application/project. If your application is in this status, you will receive an email stating such and will be required to obtain a new inspection after CORE’s approval date, which will be provided in the email with the subject line “Meter Release Rejected - CORE Electric Cooperative - *****”. After obtaining a new inspection from the AHJ, please forward the new inspection again to interconnections@core.coop.

Pending Meter Installation

Pending Meter Install

After CORE has received the meter release, and it has been accepted by CORE, the application will move to the Pending Meter Install status. This is when our metering department will show up on-site, within 5-10 business days, to inspect the system and install the production meter if applicable (for a Qualifying Facility the production meter is required).

System Changes Needed

If CORE’s metering team finds issues with your system upon their inspection (e.g., not built to CORE’s approved

design, missing placards, breakers off, etc.), the application will be moved to the “System Changes Needed” status. PowerClerk will send another email out with notes from the metering team stating why the inspection was turned down. The homeowner will also have a blue door hanger with the same notes and an authenticated link to provide photo evidence of the changes. Once the necessary changes have been made, a new form will be available for you to submit pictures and notes stating what changes you made. The new form is called “System Changes”, which again can be found under Project View (Project Landing Page) > Available Forms section.

Form Name	Form Status
Downloadable Documents (As Available)	In Progress
10. System Changes Review - CORE	New Form Became available on 7/26/2023 at 7:52 AM
11. Additional Attachments (Optional)	New Form Became available on 7/26/2023 at 7:52 AM
9. System Changes	New Form Became available on 7/26/2023 at 7:52 AM

Figure 40: Project View (Project Landing Page) System Changes Form

After you click the “Begin” button, you will be presented with the form shown below initially. For convenience, you will find CORE’s notes for the turndown by the metering group here (same as the email that was sent out via PowerClerk). Only submit this form if the requested changes have been made.

CHANGES ARE NEEDED TO THIS SYSTEM

Please see notes from CORE as to the system changes required before meter installation can be completed.

Have the above changes been made to the system? *

☐ Yes

☐ No

Figure 41: System Changes Form 1

If the changes have been made, select “yes”. Then the same form will expand to show the following image, which includes upload spots for you to include pictures of the changes and provide any notes you might think is relevant about the system changes. **Note: The warning is a reminder this is not the place to submit “As-Builts” or any other modification to the project/application.**

WARNING

Please do not submit "As-Built" documents (site plans, one-line diagrams, spec sheets) in the below attachment spots. Any deviation from the approved design (see Level 1 Interconnection Application Signed document on the form "Downloadable Documents (As Available)") will automatically cancel the application. In which case, you will be required to submit a new application, pay the application fee again, and the application will be at the back of the queue.

Please provide photo evidence of system changes. *

[OPTIONAL] Additional photo evidence of system changes.

[OPTIONAL] Additional photo evidence of system changes.

Include any notes to CORE about the system changes if you think they are necessary.

☐ I acknowledge that per CORE's Small Generation Interconnection Procedures, any modification of the project data, equipment configuration, project design, interconnection site location, or installation contractor of the Generating Facility after CORE's approval for installation has been sent to the interconnection customer and/or contractor will result in forfeiture of the application processing fee and require resubmittal of the Interconnection Application. *

Figure 42: System Changes Form 2

Complete: PTO Issued

At this state, the application has been approved by CORE, the meter has been installed if a production meter was requested (required if the application is a qualifying facility (QF)) and has passed inspection from CORE's metering team. You will receive an email stating that Permission To Operate (PTO) has been issued. You can find a copy of the document attached to the same email. Backup Energy Connection Application

Backup Energy Connection Application

The process for the Backup Energy Connection Applications follows the same process as the Level 1 Interconnection Application process except for a few steps. Signatures are not required as a part of this process, and meter installs are not performed by our metering technicians.

Starting The Application

1. From the Homepage, click the "New Backup Energy Connection Application (Generator and Battery Storage Only)" button to begin the application process.

CORE Electric Cooperative SGI Application ▾

New Level 1 Interconnection Application New Backup Energy Connection Application (Generator and Battery Storage Only) ←

All Projects Pending Review Pre-Approval Queue Application Review Pending Transformer Upgrade Applicant Resizing To Fit Transformer

Figure 43: Backup Energy Connection Starting Point

Contact Information

2. This application consists of two (2) pages.

- a. The first page is the customer/homeowner contact information
- b. The second page is the Backup Energy Information

1
Contact Information

2
Backup Energy Information

3. Note the **Important Information** on Page 1

IMPORTANT INFORMATION:

- PowerClerk automatically saves your progress.
- Fields with a red * (asterisk) are **REQUIRED**.
- The blue (?) dots reveal helpful tips to guide you through the application.
- After you log out, you can log back in and pick up where you left off.
- Navigate using the buttons at the bottom of the page or the page boxes above.
- Click the "Submit" button at the end of the application to submit.

Figure 44: Backup Energy Connection Application Information

4. The application beings with the customer information, customer's account number (if applicable), and the AHJ

Interconnection Customer Information (installation location)

Name *

First Last

Company

Company

Address *

Street

City Zip Code

Email *

Email

Phone *

(###) ###-####

Is the homeowner an existing CORE Electric Cooperative member? *

☐ Yes

☐ No

CORE Electric Cooperative Account Number: *

Local Building Department - AHJ *

Figure 45: Customer Contact Information

5. Contractor Information

Backup Energy Information

On the second page of the application, you will fill out the small generating facility information.

Small Generating Facility Information

6. Please provide the following information
 - a. Commercial or Residential Customer
 - b. Type of Backup Source (Battery or Generator)

Commercial or Residential? *

Select...

Type of backup source: *

Select...

Figure 46: Backup Source Type and Customer Type

- c. If the Type of Backup Source is “Battery”, see [Backup Energy Connection Energy Storage](#)
- d. If the Type of Backup Source is “Generator”, see [Backup Energy Connection Energy Storage](#)

Energy Storage

- 7. Next, fill out if there is an existing storage on-site

Is there existing energy storage on-site? *

☐ Yes

☐ No

Figure 47: Backup Energy Existing Energy Storage

- a. If “Yes”, enter the following details
 - i. Existing size (kW)
 - ii. Existing size (kWh)

Existing Energy Storage Size [kW]: *

Existing Energy Storage Size [kWh]: *

Figure 48: Backup Energy Existing Energy System Size

- 8. If you selected “Battery” as the Type of Backup Source
 - a. Enter the following details by clicking on the appropriate button
 - i. If AC coupled, use the “Add Integrated Energy Storage” button
 - 1. Add Quantity
 - 2. Select Model
 - ii. If DC couple, use the “Add Inverter and Battery” button
 - 1. Add quantity for Inverter and select the model
 - 2. Add quantity of Battery and select the model
 - iii. You must click the “Calculate” button to proceed

Proposed New Energy Storage System *

Add Integrated Energy Storage Add Inverter and Battery

Total Nameplate Energy Capacity: Not yet calculated

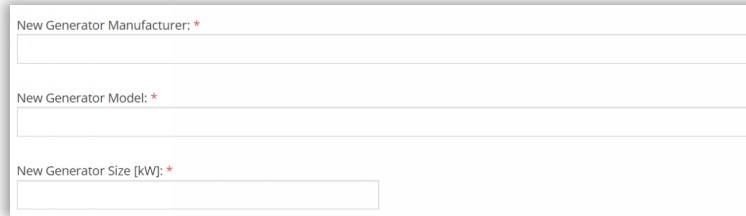
Total Max. Continuous Discharge Rate: Not yet calculated

Calculate

Figure 49: Backup Energy New Energy Storage System

- 9. If you selected “Generator” as the Type of Backup Source

- a. Enter the following information:
- i. Generator Manufacturer
 - ii. Generator Model
 - iii. Generator Size (kW)

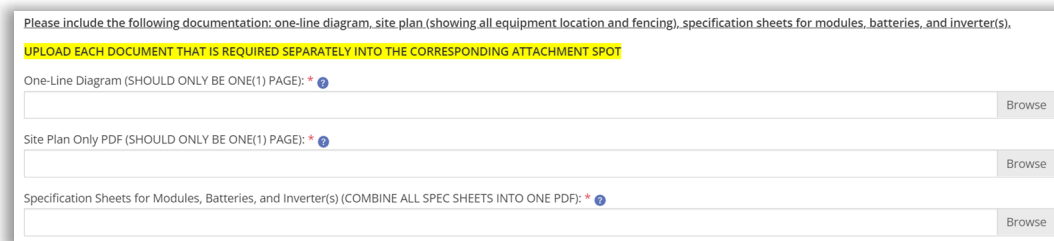


A form titled "New Generator Information" with three input fields. The first field is labeled "New Generator Manufacturer: *" and is empty. The second field is labeled "New Generator Model: *" and is empty. The third field is labeled "New Generator Size [kW]: *" and is empty.

Figure 50: New Generator Information

Required Attachments

The final section of the application is where you upload the required attachments. Be sure to click “Submit” at the bottom of the page to submit the application to CORE.



A form titled "Backup Energy Required Attachments" with three input fields. The first field is labeled "One-Line Diagram (SHOULD ONLY BE ONE(1) PAGE): *" and has a "Browse" button. The second field is labeled "Site Plan Only PDF (SHOULD ONLY BE ONE(1) PAGE): *" and has a "Browse" button. The third field is labeled "Specification Sheets for Modules, Batteries, and Inverter(s) (COMBINE ALL SPEC SHEETS INTO ONE PDF): *" and has a "Browse" button. A yellow banner at the top reads "UPLOAD EACH DOCUMENT THAT IS REQUIRED SEPARATELY INTO THE CORRESPONDING ATTACHMENT SPOT".

Figure 51: Backup Energy Required Attachments