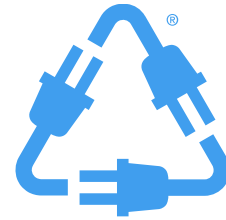




PowerClerk Applicant Training Guide

October 2022



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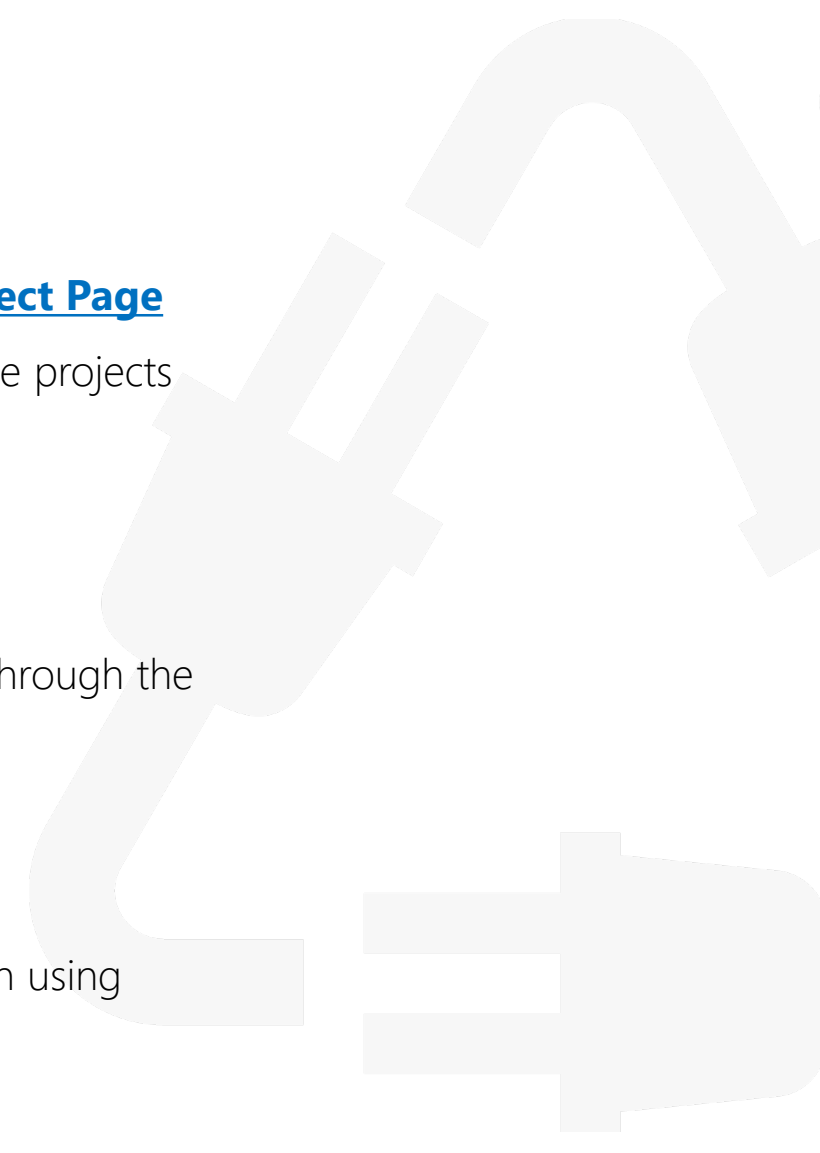
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PowerClerk Overview



PowerClerk
Launch
October 18, 2022

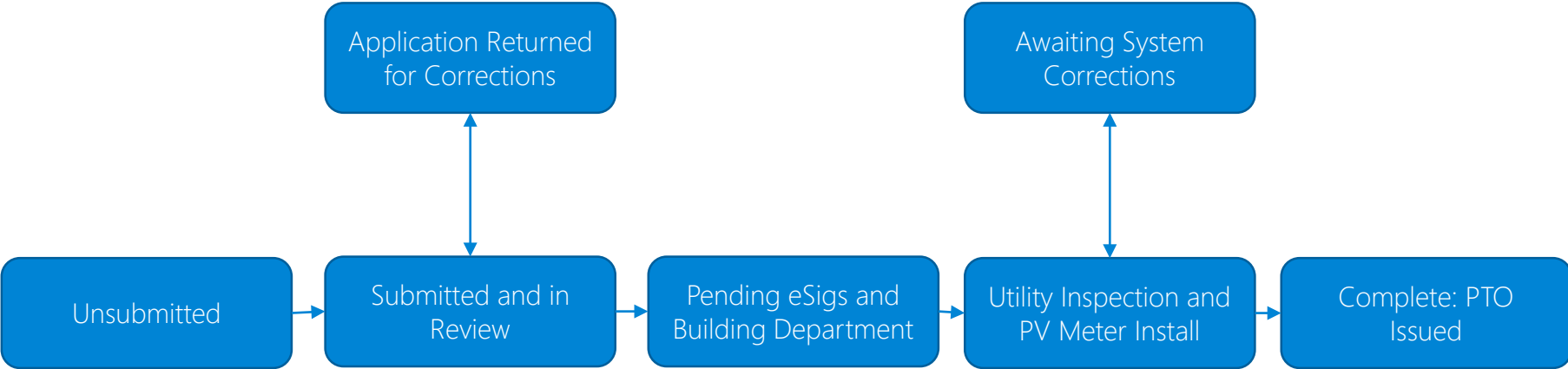
PowerClerk Overview



PowerClerk is the online application portal for LEU's PV System Interconnection Applications and will be used to:

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

LEU PowerClerk PV Application Process Overview



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

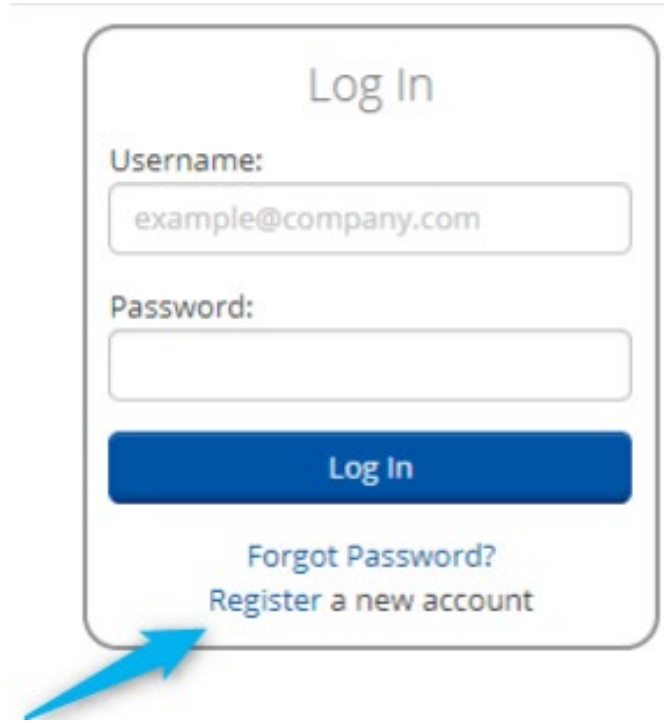
Step Two

- 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

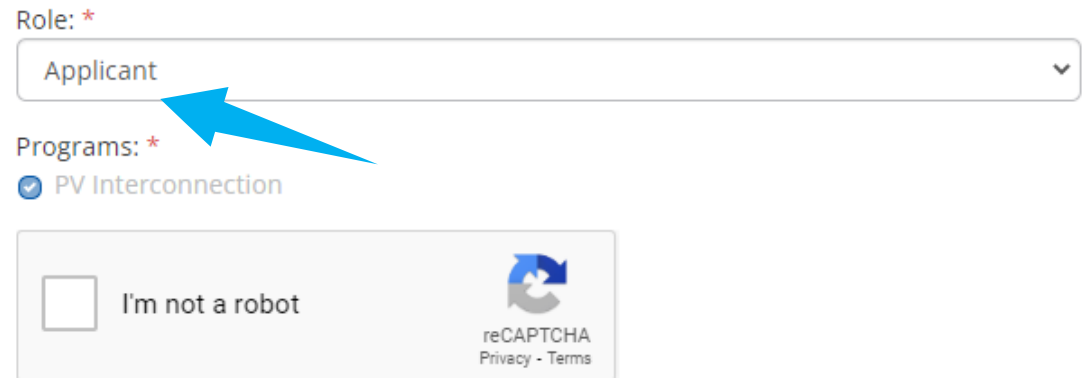
Username:
example@company.com

Password:

Log In

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

Roles And Programs



Role: *

Applicant

Programs: *

PV Interconnection

I'm not a robot

reCAPTCHA
Privacy - Terms

Already have a PowerClerk Account?

Step One

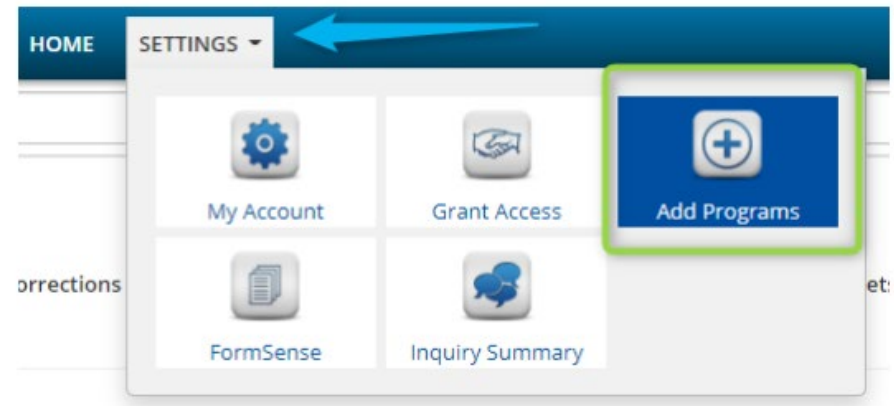
- Log Into your PowerClerk account. Any PowerClerk account will do.

Step Two

- Select the Settings Menu and select "Add Programs".

Step Three

- Under "Program to Add" select Lodi Electric Utility



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.

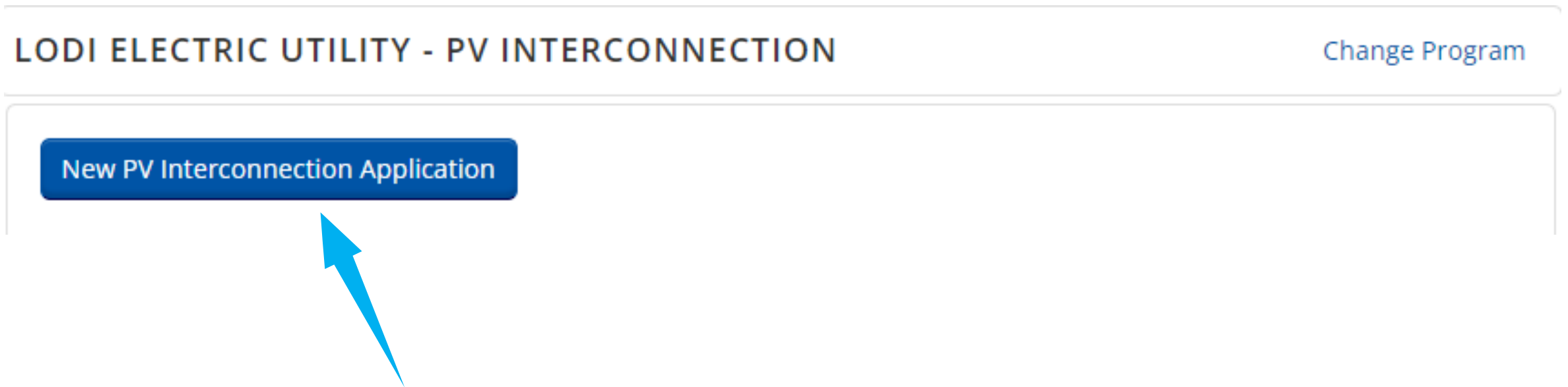
The screenshot shows the top section of the PowerClerk application. On the left is the logo for the City of Lodi, California Electric Utility. On the right is the PowerClerk logo. Below the logos, the text 'Welcome, Applicant | Log Out' is displayed. A dark blue navigation bar contains the following items from left to right: 'HOME', 'PROGRAM DESIGN' with a dropdown arrow, 'ADMIN' with a dropdown arrow, 'SETTINGS' with a dropdown arrow, 'CPR ADMIN' with a dropdown arrow, 'SUPPORT CENTER', a white button with 'ASK A QUESTION' text, and a notification bell icon with a dropdown arrow. Below the navigation bar, the text 'LODI ELECTRIC - PV INTERCONNECTION' is shown on the left, and 'Change Program' is shown on the right. A blue arrow points from the bottom right towards the 'Change Program' link.

Application Process

New Applications

Upon logging into PowerClerk you will see a blue button, [New PV Interconnection Application](#), at the top of your screen.

Click this to begin your application.



Application Navigation

This page is where all required PV Interconnection Application information will be fill-out and submitted.

The screenshot displays the PowerClerk interface for the City of Lodi, California Electric Utility. At the top left is the utility logo. To the right, it says "Welcome, Applicant" and "Welcome, Lane Applicant | Log Out". A dark blue navigation bar contains "HOME", "SETTINGS" with a dropdown arrow, and a white button labeled "ASK A QUESTION". The main content area has a "Saving ..." status indicator in the top right. The title is "Lodi Electric Utility (LEU), PV System Online Application" with the address "Lodi Electric Utility, 1331 S. Ham Ln. Lodi, CA 95242, 209.333.6762". Below the title are instructions for residential and commercial projects.

Lodi Electric Utility (LEU), PV System Online Application
Lodi Electric Utility, 1331 S. Ham Ln. Lodi, CA 95242, 209.333.6762

RESIDENTIAL PROJECTS: Residential applicants must start here to obtain pre-approval from LEU prior to obtaining a Building Permit from the City of Lodi's Building Department

COMMERCIAL PROJECTS: Applicants must initiate the process by applying for a permit with the City of Lodi's Building Department. After doing so, please proceed below.

Application Submission

To **submit** the application, click the blue "Submit" button at the bottom of the last page.

If any required information has not been entered denoted by *), 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.

CUSTOMER INFORMATION

For information regarding your account and historical usage information, please contact the Finance Department at (209)-333-6717.

Customer Type *

- Residential
- Commercial

Is there currently a preexisting PV system at this location? *

- Yes
- No

Unable to Submit Form

Please fix the errors below and try again.

Missing Required Fields:

- [What technology are you submitting this interconnection application for? - Page 1](#)
- [Is there an existing storage component/battery at this site? - Page 1](#)
- [Is there existing solar PV at this site? - Page 1](#)
- [Does the proposed system include an EV Charger? - Page 1](#)
- [What is the property type? - Page 1](#)

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**.

LODI ELECTRIC - PV INTERCONNECTION

[Change Program](#)

[New PV Interconnection Application](#)

[All Projects](#) [Application In Review](#) [Waiting For Application Corrections](#) [Pending ESignatures](#) [Pending Meter Install](#) [Pending System Corrections](#)
[PTO Granted](#)

Search All Columns

Project #	Current Status	Nearest Deadline Name	Project Address	Account Number Full field	Existing PV
✓ PV-00027	Pending New Owner eSignatures		123 Test St.	99999999-55555	
> PV-00026	New Owner Application: Pending Admin		55123 Test St.	88888888-55555	
> PV-00025	ARCHIVED		123 Test St.	88888888-55555	No

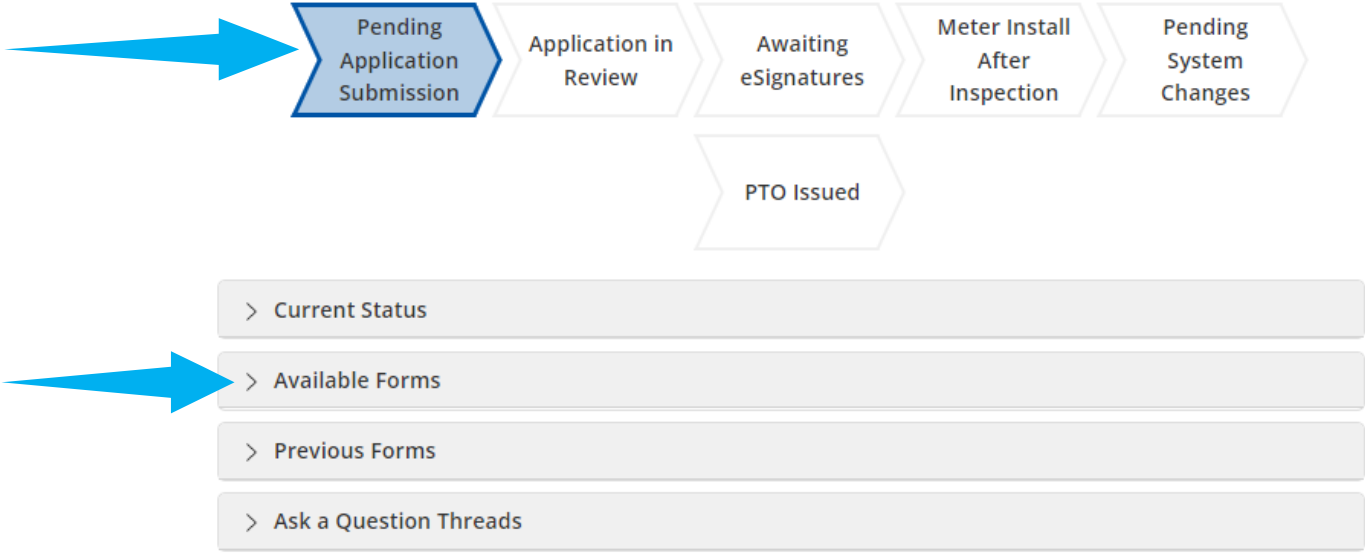


PowerClerk Project Landing Page

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.



Available Forms

Additional Project Forms In PowerClerk

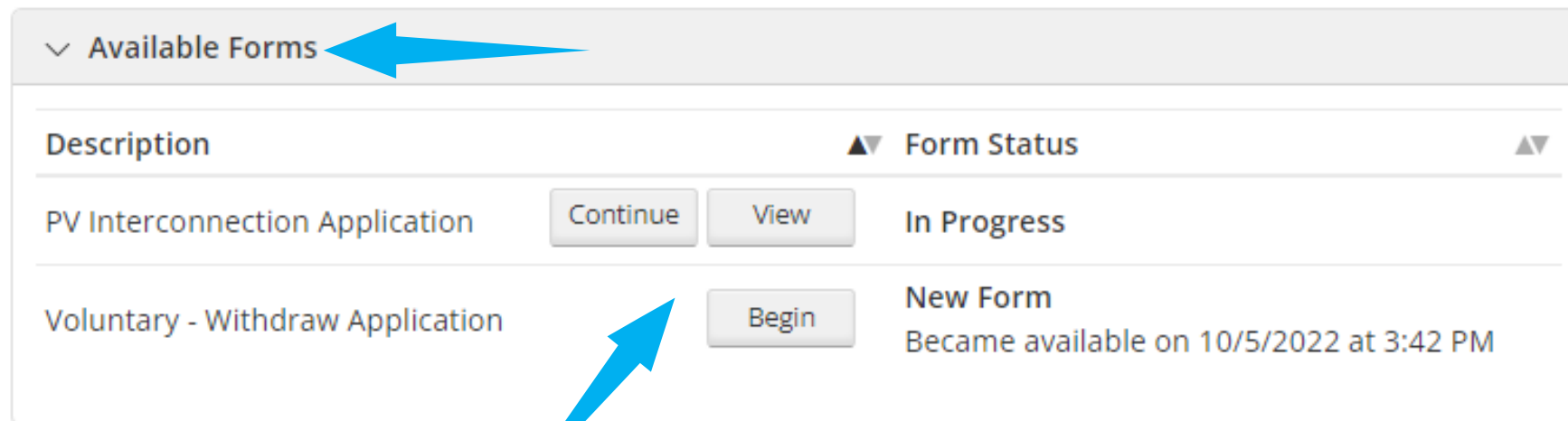
How to find and fill out available project forms

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" or "Continue" next to your form to complete and submit.

Forms designated with "Voluntary" at the beginning are optional forms the applicant may fill out at different stages of the project lifecycle.

Note: The Applicant may withdraw their request at any time by selecting the "Withdraw Application (if applicable)" and submitting.



Description	Form Status	
PV Interconnection Application	Continue	View
Voluntary - Withdraw Application	New Form Became available on 10/5/2022 at 3:42 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.

Lodi Electric PV Interconnection Application Received - Project #PV-00002

 PowerClerk Notifications <DoNotReply@PowerClerk.com>
To Applicant Tue 10/4/2022 12:35 PM

 Reply  Reply All  Forward  

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.


 PV Submittal Package V2.pdf
1 MB

Hi, Applicant

Your PV Interconnection application #PV-00002 has been received and is pending review. We will reach out shortly with updates and next steps.

Project Address: [123 Test St., Lodi CA 95240](#)

Best Regards,

 **Lodi Electric Utilities Solar Program**

This is an automated email. For questions concerning your application, please use the following contact information:
Lodi Electric Utility Solar Program
P1331 S. Ham Ln.
Lodi, CA 95242
solar@lodi.gov

Confidentiality Notice: The information in this email is for you—the recipient(s) alone. It may have privileged and confidential information. If you are not an intended recipient, do not copy, distribute or take any action that relies on it, and please notify us immediately by reply email.

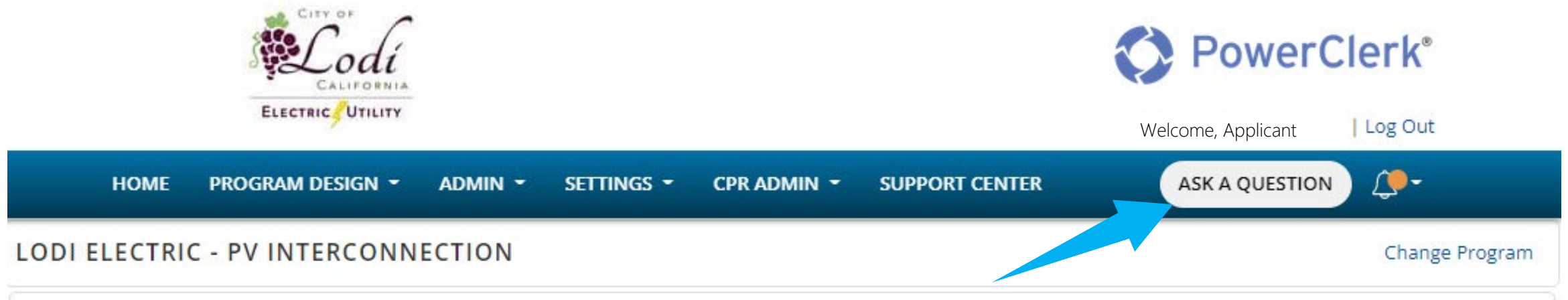
Need Help? "Ask A Question"

How to submit questions to Lodi Electric Utility

How to Submit a Question to LEU

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 LEU.

Once LEU 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 LEU Responses

You will be able to review LEU's response under the "Ask a Questions" thread within your **Projects 'View/Edit'** page.

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

The screenshot displays a sidebar menu with the following items: Current Status, Project Summary, Available Forms, Previous Forms, and Ask a Question Threads. The 'Ask a Question Threads' section is expanded, showing a dropdown menu for 'Select Inquiry:' with the option '001 - General - I need help'. Below this, there are two message threads. The first thread is from 'Melissa Applicant' dated 5/28/2021 8:44 AM with the subject 'What do I do next?'. The second thread is from 'Melissa Days - Administrator' dated 7/22/2021 1:10 PM with the subject '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'.

Thank you!