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1. Introduction

Omaha Public Power District has adopted the web-based tool, PowerClerk, to standardize and manage the Customer Owned Generation (COG) application process for our residential and commercial customers. This Enterprise User Guide will help you to understand the tool, explain your role specific process and address potential questions you may have regarding the tool.

What is Customer-Owned Generation?

OPPD customers can create much of their household’s electricity using renewable forms of customer-owned generation. The most common types of renewable energy systems are photovoltaic solar panels and wind turbines, but people also use micro-turbine, fuel cell, biomass and hydro technologies.

Regardless of the type of system being considered, it first must be vetted by OPPD before interconnection with the electric grid. After approval and installation, customer-owners will be able to get credit on their utility bills.

1.1 References

Customer Owned Generation Quick Start Video: [https://vimeo.com/368312148](https://vimeo.com/368312148)
2. Getting Started

2.1 PowerClerk Registration

Note:
- Before submitting a COG application online, all users must first register for a PowerClerk account.
- **PowerClerk does not allow multiple users to be logged on with the same username and password at the same time.** It is recommended that all contractors, customers, and installers working in PowerClerk register for their own account.

**PowerClerk Registration Process**

1. To register for PowerClerk, email the following information to ProductsandServices@oppd.com:
   a. Email Address
   b. First Name
   c. Last Name
   d. Company (optional)

**Note:** Please give OPPD 7 days to follow-up on your request. After you have been registered you will receive an email from ProductsandServices@oppd.com.
2.2 Logging In To PowerClerk

PowerClerk Login Process

1. Navigate to the OPPD PowerClerk landing page (link).
2. In the Log In box, enter your Username and Password and click Log In.

Note: If you forget your password, click the Forgot Password? link above and follow the prompts to reset your password.
2.3 Home Page Navigation

After logging in to PowerClerk, you will be immediately navigated to the home page (pictured below).

2.3.1 Views

Note: PowerClerk offers you the ability to view your projects in different Views accessible from the Home Page.

- **All Projects** — The “All Projects” View contains all projects that you have entered in PowerClerk, whether they have been submitted or not.
- **Completed Projects** — The “Completed Projects” View contains all projects that have been completed.
2.4 Settings
From the Home Page, you can access your Settings, which include the following features:

2.4.1 Manage My Account
Utilize the Manage My Account section to View or Edit your personal information (Name, Company, Email and Password)

2.4.1.1 From the Navigation Bar, click My Account.
2.4.1.2 To change any personal account information, click on their respective links:
   2.4.1.2.1 Edit Personal Info
   2.4.1.2.2 Change Password
   2.4.1.2.3 Edit Email Address

Note: Multi-factor authentication is an authentication method in which a computer user is granted access only after successfully presenting two or more pieces of evidence to an authentication mechanism.
2.4.2 Grant Access
Grant access to other registered PowerClerk Users to view or edit your projects.

To grant access to other users, follow the below steps:

1. From the Navigation Bar, click on Settings, then click the Grant Access button.
2. On the screen, you will need to click the Grant Access button.
3. A window will populate, in the window enter the email address of the user to whom you wish to grant access.

**Note:** For a person(s) to get access to your PowerClerk projects, they must already be a registered user of PowerClerk. To register, follow the registration directions outlined in Section 2.1.

2.4.3 Log Out
- To log out of PowerClerk, click the Log Out button at the top right corner of your PowerClerk screen as shown below.

**Note:** PowerClerk will automatically log you out after long periods of inactivity.
3. Entering a New Application

To submit a new application, click on the New Application button from the Home Page. This will direct you to begin the application process.

Note

- All information indicated with a red * (asterisk) is REQUIRED!
- Click on each of the blue (?) to reveal helpful tips for guiding you through the application.
- Your information is automatically saved while working on this application.
3.1 Customer Information

Interconnection Application for Customer-Owned Generation

The Customer-Owned Generation (COG) Owner (herein described as 'Owner') requests OPPD approval to construct and operate Customer-Owned Generation (COG) equipment in closed transition (parallel) with OPPD system in accordance with and as defined in the latest version of the OPPD COG Manual.

IMPORTANT INFORMATION!

- All information indicated with a red * (asterisk) is REQUIRED.
- Click on each of the blue (?) dots to reveal helpful tips for guiding you through the application.
- Your information is automatically saved while working on this application.
- As the Project Owner you will be responsible for completing both the Application and Construction Complete & Electrical Permit Information forms.
- During the course of the project all email addresses captured in the application will receive notifications informing of both the project progress and any potential updates that may be needed to the forms.

COG Owner Contact Information

Name *
First
Last

Company

Address *
Street

City
Zip Code

Email *
Email

Phone *
(phone) (area) (7)777

Is the Owner Information (above) the same as the Facility Operator? *
Yes
No

Installation Address *
New Contact
Street

City
Zip Code

OPPD Customer Account Number *

Does this location have an established electric meter? *
Yes
No
1. To begin a new application, start by entering the **COG Owner Contact Information**:
   - **Name** (First name, Last name)
   - **Company** name if applicable.
   - **Address** of the location where the Customer Owned Generation equipment will be located:
     - i. **Street**
     - ii. **City**
     - iii. **State**
     - iv. **Zip Code**
   - **Email** enter the customer/owner’s email information.
   - **Phone** enter the Customer’s phone number.

2. **Is the Owner Information (above) the same as the Facility Operator?**
   - Yes
   - No
   **Note:** For Residential properties, this will typically be “Yes”.
3. **Enter the Installation Address:**
   - Choose from the dropdown if the address is the same as the COG Owner or Facility Owner. This will prepopulate the field with the proper information.

4. **Enter the COG Owner Customer Account Number.**

5. **Does this location have an established electric meter?**
   - Yes
   - No
6. **OPPD Meter Number**

   - The Meter Number can be found on the face of the customer’s OPPD meter typically in large font. It should be numeric only and about 8 digits in length.
   
   - The Meter Number is a required field.

7. Click the **Next** button to access the next step in the process.
3.2 Contractor Information

Click the # to Go Directly to the Application Page
Entering Contractor Information

Contractor Information

1. Is a Contractor performing this installation?
   - Yes
   - No

**Note:** If a Contractor is not constructing the installation, select No, no further information is required.

2. Enter the Contractor Contact Information: (Required if contractor is constructing the installation)
   - Name (First name, Last name)
   - Company
   - Address of the contractor:
     i. Street
     ii. City
     iii. State
     iv. Zip Code
   - Email enter the contractor’s email information.
   - Phone enter the contractor’s phone number
Facility Designer/Engineer Information

3. **Is there a Facility Designer/Engineer associated with this installation?**
   - Yes
   - No

   **Note:** If a Facility Designer/Engineer is **not associated** with the installation, select **No**, no further information is required.

4. **Enter the Facility Designer/Engineer Contact Information** (Required if there is a Facility Designer/Engineer associated with this installation):
   - **Name** (First name, Last name)
   - **Company**
   - **Address** of the facility designer/engineer:
     i. **Street**
     ii. **City**
     iii. **State**
     iv. **Zip Code**
   - **Email** of the facility designer/engineer.
   - **Phone** of the facility designer/engineer.
5. Click the **Next** button to access the next step in the process.

**Note:** To go back to a previous step, click the **Back** button in the bottom left of your window.

### 3.3 Equipment

#### Entering Equipment Information

**Equipment**

1. **Is the project an expansion of any current generation equipment?** (Required)
   - Yes
   - No

2. **Select the Duration of Parallel Operation** (Required):
   - **Sustained**
- Momentary Transfer Switch
- Open Transition (On its own)

Note: You do not need to fill out the application with only an Open Transition switch.

Main Generation Equipment

3. Select your **Main Generation Equipment to be installed** from the dropdown list (Required):
   - PV Solar
   - Other PV Solar
   - Wind Turbine
   - Biomass Generator
   - Natural Gas Generator
   - Diesel Generator
   - Hydro Generator
   - Energy Storage (On its own)

Note: Multiple types of generation equipment can be added to your COG Application. Please review the equipment forms on the following pages for guidelines.
PV Solar

1. Select a Mount Type:
   - Rooftop
   - Ground
2. Select an Inverter Type:
   - String Inverter
   - Microinverter

3. PV System Specifications
   - Inverter
     - Enter the quantity of Inverters: # of Inverters
     - Select an inverter type from the dropdown
     - Select an inverter model from the dropdown
   - PV Array
     - Enter the quantity of arrays: # of Arrays
     - Select an array type from the dropdown
     - Select an array model from the dropdown

   ![PV System Specification](image)

Note: To add additional inverters
1. Utilize the Add Array and Add Inverter buttons
2. Click Calculate when you are finished to calculate the System & Inverter Ratings.

4. Enter the Total PV System Array DC Output: # (kW)

   ![Total PV System Array DC (kW)](image)
5. Enter the **Total PV Inverter Max Continuous Output: # (kW)**

6. Are any **Energy Storage devices** being added to this installation?
   - Yes
   - No

**Note:** If **Yes**, enter the **Energy Storage** information.

- **Energy Storage Manufacturer Name**
- **Energy Storage Model Name**
- **Total Energy Storage Capacity (kWh)**
- Will the **Energy Storage** have a dedicated inverter?
  - Yes, if yes complete the **Inverter Information** (below).
    - **Inverter Manufacture Name**
    - **Inverter Model Name**
    - **Total Continuous AC (kW)**
  - No
Will the Energy Storage have a dedicated inverter? *
- Yes
- No

Inverter Manufacturer Name *

Inverter Model Name *

Total Continuous AC (kW) *
**Other PV Solar**

<table>
<thead>
<tr>
<th>PV Solar Installation</th>
</tr>
</thead>
<tbody>
<tr>
<td>PV Solar Mount Type</td>
</tr>
<tr>
<td>- Rooftop</td>
</tr>
<tr>
<td>- Ground</td>
</tr>
<tr>
<td>PV Inverter Type</td>
</tr>
<tr>
<td>- String Inverter</td>
</tr>
<tr>
<td>- Microinverter</td>
</tr>
<tr>
<td>PV Inverter Quantity</td>
</tr>
<tr>
<td>PV Inverter Manufacturer</td>
</tr>
<tr>
<td>PV Inverter Model</td>
</tr>
<tr>
<td>PV Inverter Max Continuous Output AC (kW)</td>
</tr>
<tr>
<td>PV Array Quantity</td>
</tr>
<tr>
<td>PV Array Manufacturer</td>
</tr>
<tr>
<td>PV Array Model</td>
</tr>
<tr>
<td>Tilt</td>
</tr>
<tr>
<td>Azimuth</td>
</tr>
<tr>
<td>Tracking</td>
</tr>
<tr>
<td>- Fixed</td>
</tr>
<tr>
<td>- Single Axis</td>
</tr>
<tr>
<td>- Dual Axis</td>
</tr>
<tr>
<td>PV Array DC (kW)</td>
</tr>
<tr>
<td>Is there a separate secondary inverter being installed?</td>
</tr>
<tr>
<td>- Yes</td>
</tr>
<tr>
<td>- No</td>
</tr>
<tr>
<td>Is a secondary PV Solar Array being installed?</td>
</tr>
<tr>
<td>- Yes</td>
</tr>
<tr>
<td>- No</td>
</tr>
<tr>
<td>Total PV System Array DC (kW)</td>
</tr>
<tr>
<td>Total PV Inverter Max Continuous Output AC (kW)</td>
</tr>
<tr>
<td>Are any energy storage devices being added to this installation?</td>
</tr>
<tr>
<td>- Yes</td>
</tr>
<tr>
<td>- No</td>
</tr>
</tbody>
</table>

**Note:** If your PV System Inverter or Array is not listed in the PV System Specification lists below, select "Other PV Solar" instead of "PV Solar" under generation equipment.
1. Select a Mount Type:
   - Rooftop
   - Ground

2. Select an Inverter Type:
   - String Inverter
   - Microinverter

3. Enter the PV Inverter Quantity

4. Enter the PV Inverter Manufacturer

5. Enter the PV Inverter Model

6. Enter the PV Inverter Max Continuous Output AC (kW)

7. Enter the PV Array Quantity

8. Enter the PV Array Manufacturer
9. Enter the **PV Array Model**

   PV Array Model *

10. Enter the **Tilt**

   Tilt *

11. Enter the **Azimuth**

   Azimuth *

12. **Tracking**
   - Fixed
   - Single Axis
   - Dual Axis

13. Enter **PV Array DC Output (kW)**

   PV Array DC (kW) *
14. **Is there a separate secondary inverter being installed?**
   - Yes, if Yes, enter the Secondary PV information (below).
     - Secondary PV inverter Quantity
     - Secondary PV Inverter Manufacturer
     - Secondary PV Inverter Model
     - Secondary PV Inverter Max Continuous Output AC (kW)
   - No
15. Is a secondary PV Solar Array being installed?
   - Yes, if Yes, enter the Secondary PV information (see example below).
     - Secondary PV Solar Mount Type
       - Rooftop
       - Ground
     - Secondary PV Array Quantity
     - Secondary PV Array Manufacturer
     - Secondary PV Array Model
     - Tilt
     - Azimuth
     - Tracking
       - Fixed
       - Single Axis
       - Dual Axis
     - Secondary PV Array DC (kW)
   - No
16. Are there any additional inverter(s) being installed?
   - Yes, if Yes, enter the additional inverter information (see example below).
     - Enter the Additional PV Inverter(s) Max Continuous Output AC (kW)
   - No

17. Enter the Total PV System Array DC (kW)

18. Enter the Total PV Inverter Max Continuous Output AC (kW)

19. Are any Energy Storage devices being added to this installation?
   - Yes
   - No

Note: If Yes, enter the Energy Storage information.

- Energy Storage Manufacturer Name
- Energy Storage Model Name
- Total Energy Storage Capacity (kWh)
- Will the Energy Storage have a dedicated inverter?
  - Yes, if yes complete the Inverter Information (below).
    - Inverter Manufacture Name
    - Inverter Model Name
    - Total Continuous AC (kW)
  - No

20. Enter any additional comments about the generation equipment to be installed in the box provided.
Wind Turbine Installation

1. Enter the **Quantity of Wind Turbines to be installed**

   Quantity of Wind Turbines to be installed *

2. Enter the **Wind Turbine Tower Height (Feet)**

   Wind Turbine Tower Height (Feet) *
3. Enter the **Wind Turbine Manufacturer Name**

   Wind Turbine Manufacturer Name *

4. Enter the **Wind Turbine Model Name**

   Wind Turbine Model Name *

5. **Wind Turbine Generator Type**
   - Inverter
   - Induction

   Wind Turbine Generator Type *
   ○ Inverter
   ○ Induction

6. Enter the **Total Wind Turbine AC (kW)**

   Total Wind Turbine AC (kW) *

21. **Are any Energy Storage devices being added to this installation?**
   - Yes
   - No

   Are any Energy Storage devices being added to this installation? *
   ○ Yes
   ○ No

   **Note:** If Yes, enter the Energy Storage information.
- Energy Storage Manufacturer Name
- Energy Storage Model Name
- Total Energy Storage Capacity (kWh)
- Will the Energy Storage have a dedicated inverter?
  - Yes, if yes complete the Inverter Information (below).
    - Inverter Manufacture Name
    - Inverter Model Name
    - Total Continuous AC (kW)
  - No

22. Enter **any additional comments about the generation equipment to be installed** in the box provided.
(Biomass Generator, Natural Gas Generator, Diesel Generator) Installation

1. **Enter the Quantity of Generators to be installed**

   Quantity of Generators to be installed *
2. **Generator Type**
   - Synchronous
   - Induction

3. Enter the **Generator Manufacturer Name**

4. Enter the **Generator Model Name**

5. Enter the **Number of Cylinders**

6. Enter the **Generator Location**

7. Enter the **Total AC Rated Output (kW)**

8. Enter the **Total AC Rated Output (kVa)**
9. **Enter the Generator Unit Output Voltage**

   **Generator Unit Output Voltage***

10. **Are any Energy Storage devices being added to this installation?**
   - Yes
   - No

   **Are any Energy Storage devices being added to this installation?***
   - Yes
   - No

**Note:** If Yes, enter the Energy Storage information.

   - **Energy Storage Manufacturer Name**
   - **Energy Storage Model Name**
   - **Total Energy Storage Capacity (kWh)**
   - **Will the Energy Storage have a dedicated inverter?**
     - Yes, if yes complete the Inverter Information (below).
       - Inverter Manufacturer Name
       - Inverter Model Name
       - Total Continuous AC (kW)
     - No
11. Enter **any additional comments about the generation equipment to be installed** in the box provided.
# Hydro Generator

**Main Generation Equipment**

Main Generation Equipment to be installed:
- Hydro Generator

Will a different generation equipment be installed as well?
- Yes
- No

**Generator Installation**

Quantity of Generators to be installed:

Generator Type:
- Synchronous
- Induction

Generator Manufacturer Name:

Generator Model Name:

Water Depth at Dam (Foot):

Total AC Rated Output (KW):

Total AC Rated Output (KVA):

Generator Unit Output Voltage:

Are any Energy Storage devices being added to this installation?
- Yes
- No

**Additional Comments**

Any additional comments about the generation equipment to be installed

---

1. **Enter the Quantity of Generators to be installed**

   Quantity of Generators to be installed:
2. **Generator Type**
   - Synchronous
   - Induction

3. Enter the **Generator Manufacturer Name**

4. Enter the **Generator Model Name**

5. Enter the **Water Depth at Dam (Feet)**

6. Enter the **Total AC Rated Output (kW)**

7. Enter the **Total AC Rated Output (kVA)**

8. Enter the **Generator Unit Output Voltage**
9. Are any Energy Storage devices being added to this installation?
   - Yes
   - No

Note: If Yes, enter the Energy Storage information.

- Energy Storage Manufacturer Name
- Energy Storage Model Name
- Total Energy Storage Capacity (kWh)
- Will the Energy Storage have a dedicated inverter?
  - Yes, if yes complete the Inverter Information (below).
    - Inverter Manufacturer Name
    - Inverter Model Name
    - Total Continuous AC (kW)
  - No
10. Enter **any additional comments about the generation equipment to be installed** in the box provided.
Energy Storage (On its Own)

1. Enter the **Energy Storage Manufacturer Name**

   Energy Storage Manufacturer Name *

2. Enter the **Energy Storage Model Name**

   Energy Storage Model Name *

3. Enter the **Total Energy Storage Capacity (kWh)**

   Total Energy Storage Capacity (kWh) *
4. **Will the Energy Storage have a dedicated inverter?**
   - Yes, if yes complete the **Inverter Information** (below).
     - Inverter Manufacturer Name
     - Inverter Model Name
     - Total Continuous AC (kW)
   - No

5. **Enter any additional comments about the generation equipment to be installed** in the box provided.

**Interconnection Information**

1. **Enter the Aggregate System Nameplate Capacity DC (kW)**

2. **Enter the Aggregate System Inverter Nameplate Capacity AC (kW)**
3. **Interconnection Phase**
   - Single
   - Three

4. Choose your installation **Interconnection Voltage** from the dropdown

5. **How would the COG Owner like to Transfer Power with OPPD?**
   - Import – Only
   - Import/Export, if Import/Export, enter **Power Transfer – Max AC kW level**
   - Export – Only, if Export – Only, enter **Power Transfer – Max AC kW level**

6. **Does the COG Owner wish to net meter with OPPD?**
   - Yes
   - No
7. Click the **Next** button to access the next step in the process.

   ![Next button and Back button]

   **Note:** To go back to a previous step, click the **Back** button in the bottom left of your window.
### 3.4 Attachments

#### Upload Site-Specific Information
- **Site Plan**
- **One Line Diagram**
- **Interconnection Disconnect Manufacturer Data**

#### Upload Equipment-Specific Information
- **Energy Storage Manufacturer Data**

#### Optional Site Specific Uploads
- **Floor Plan**
- **Preliminary Relaying**
- **Schematic Diagram**
- **Parallel Equipment Manufacturer Data**
- **Interconnection Breaker Manufacturer Data**

#### Additional Uploads
- **Other Document 1**
- **Other Document 2**
- **Other Document 3**
- **Other Document 4**

---

Click the # to Go Directly to the Application Page
1. To upload/attach documents to the attachments page:
   - Click **Browse**
   - Attach the required documents saved on your computer

   ![Upload Site-Specific Information](image)

   **Note:** Required documents are indicated with a red (*) asterisk. Upload any supporting documents not defined on the Attachments page to the Additional Uploads section.

2. Click the **Next** button to access the next step in the process.

   **Note:** To go back to a previous step, click the **Back** button in the bottom left of your window.
3.5 Final Review

Enter your Estimated Installation Start Date

Enter your Estimated Installation Completion Date

Click to Populate Calendar and Enter Date
3. Click **Submit** to submit your application for review
Following the Submission of your Customer-Owned Generation application, the customer will be asked to complete a signature request via DocuSign.

1. In order for the customer to sign the requested documents:
   - The customer will receive an email from DocuSign with the following Subject line: “eSignature request: Project: OPPD – {Project Number} – Omaha Public Power District”

2. After accessing the email, click Review Document

3. The customer will be directed to a DocuSign site to review and sign necessary documents.

4. Once the customer has signed and filled out the required documents, the customer will be prompted to click the Finish button within DocuSign to complete the process.
   - Note: Upon completion, the customer will receive an email with the signed/completed documents for their records.

5. Following the confirmation of signatures, the Customer-Owned Generation application will go out for Technical Review
4. Application Needs Corrections

4.1 Application Review – Changes Needed

1. The contractor/installer will be prompted to make changes to their application via the following email. 
   (DoNotReply@PowerClerk.com)

   **Note:** Corrections/changes need will be outlined under the Questions/Comments section of the email.

**Updating Application (Application Review Changes Needed)**

1. Log into PowerClerk.
2. From the Home page locate the project that needs corrections.
Note: Applications needing correction will be in the following statuses.

- Application review – Changes Needed
- Technical review – Changes Needed
- Application Updates Required
- Inspection Issue – Changes Needed

3. Click the arrow next to the Project # to expand the project and click View/Edit.

4. Once on the View/Edit page, under the Available Forms section click Edit next to Application to edit the application.

5. Once in the application, navigate to the page(s) that need correction and make changes before resubmitting the application.
5. Construction Completion & Electrical Permit

5.1 Confirm Construction in PowerClerk

Following the completion of construction, log in to PowerClerk to acknowledge completion of construction.

Confirming the Completion of Construction

Construction Complete

1. To confirm construction, click the calendar icon under **when was construction for the installation completed?** And select the construction completion date using the calendar.
2. Since the Approval to Construct, did the Equipment or Site Plan change?
   - Yes, if Yes, Submit the form and make review and update the information on your application.
   - No

   Since the Approval to Construct, did the Equipment or Site Plan change? *
   - Yes
   - No

Inspection Information

3. Enter which governing body performed the electrical inspection?

   Which governing body performed the electrical inspection? *

4. When did the inspection take place?

   When did the inspection take place? *

5. Check the box I certify that an electrical inspection was performed for this installation.

   I certify that an electrical inspection was performed for this installation. *

Witness Test Information

6. From the drop down select, Preferred day of the week.

   Preferred day of the week *
   - Select...
   - Monday
   - Tuesday
   - Wednesday
   - Thursday
   - Friday

7. From the drop down select, Preferred time of day.

   Preferred time of day *
   - Select...
   - 8AM
   - 9AM
   - 10AM
   - 11AM
   - 12PM
   - 1PM
   - 2PM
8. From the drop down select, **Second preferred day of the week**.

9. From the drop down select, **Second preferred time of the day**.

10. Enter the **On-Site Contact Name (First name, Last name)**.

11. Enter the **On-Site Contact Phone Number**.

12. Finally, click **Submit**.
6. Application/Project Status

6.1 Check the Status of an Application

At key points in the process, the contractor/installer will receive emails regarding status updates and information on the next steps of the process.

**Checking Application/Project Status**

1. Log in to PowerClerk.
2. From the Home page, click on the All Projects view.

![All Projects](image)

3. From here you can view all of your projects in their current status.

![Current Status](image)

4. If you want further detail, click on the arrow next to a Project #, then click the View/Edit Project button for more information.

![Click View/Edit Project](image)

5. Clicking the View/Edit Project button, will take you to the Project Dashboard.
6.2 View/Edit Project Page

- **Current Status** – This section displays the current status for the application/project.
- **Available Forms** – All forms available to Edit/View will be located in this section.
- **Previous Forms** - All previous forms available to View will be located in this section.
• **Access Grants For This Project** – This section details those with access to view the project.
• **Attachments** – All attachments can be found in this section as well as the Application (4) Attachments page.
• **Communications Sent [Email address]** – This section archives all communications that have gone out on the project.
7. Status Definitions

7.1 Status: Application Review

<table>
<thead>
<tr>
<th>Status:</th>
<th>Application Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Definition:</td>
<td>Contractor/Installer has successfully submitted a project. When an application reaches this status, it is given a Project # and OPPD is alerted that a new project is ready for review.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

7.2 Status: Application Review – Changes Needed

<table>
<thead>
<tr>
<th>Status:</th>
<th>Application Review – Changes Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Definition:</td>
<td>The Application has been reviewed and requires corrections. A notification including required corrections is sent to the Contractor/Installer.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

7.3 Status: Technical Review

<table>
<thead>
<tr>
<th>Status:</th>
<th>Technical Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Definition:</td>
<td>All required information has been provided and the application is now ready for Technical Review.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>No</td>
</tr>
<tr>
<td>Status</td>
<td>Technical Review – Changes Needed</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Status Definition:</strong></td>
<td>During the Technical Review, we determined there are issues with the</td>
</tr>
<tr>
<td></td>
<td>proposed application. The contractor/installer needs to follow the</td>
</tr>
<tr>
<td></td>
<td>instructions and make requested changes.</td>
</tr>
<tr>
<td><strong>Communication Sent?</strong></td>
<td>Yes</td>
</tr>
</tbody>
</table>
### 7.5 Status: Approved for Construction

<table>
<thead>
<tr>
<th>Status</th>
<th>Approved for Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status Definition:</strong></td>
<td>The Technical Review for the proposed application is complete. The contractor/installer can begin the installation of the Customer-Owned Generation System to be inspected by a local authority. Once construction is complete, the contractor/installer needs to log back in to PowerClerk to acknowledge construction and schedule a Witness Test.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### 7.6 Status: Application Updates Required

<table>
<thead>
<tr>
<th>Status</th>
<th>Application Updates Required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status Definition:</strong></td>
<td>Following acknowledgement of construction completion. The application will enter this status if equipment updates need to be made to the application. The application will remain in this status until updates are made and the application is resubmitted.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>No</td>
</tr>
</tbody>
</table>

### 7.7 Status: Inspection Verification & FA Creation

<table>
<thead>
<tr>
<th>Status</th>
<th>Inspection Verification &amp; FA Creation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status Definition:</strong></td>
<td>Following confirmation of construction approval and receiving the permit OPPD the application will forwarded to schedule a Witness Test and/or Net Meter.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>No</td>
</tr>
</tbody>
</table>
### 7.8 Status: Inspection Issue – Changes Needed

<table>
<thead>
<tr>
<th>Status:</th>
<th>Inspection Issue – Changes Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Definition:</td>
<td>Upon review of construction completion there was no permit received. The application will remain in this status until the permit is received.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### 7.9 Status: Schedule Field Activity

<table>
<thead>
<tr>
<th>Status:</th>
<th>Schedule Field Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Definition:</td>
<td>OPPD has received the release from the local inspection authority. The Customer-Owned Generation Witness Test and/or Net Meter is ready for scheduling.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>No</td>
</tr>
</tbody>
</table>

### 7.10 Status: Witness Test

<table>
<thead>
<tr>
<th>Status:</th>
<th>Witness Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Definition:</td>
<td>The Witness Test and/or Net Meter has been scheduled. If the inspection passes, the required meter(s) will be set/changed.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>No</td>
</tr>
</tbody>
</table>
### 7.11 Status: Witness Test Failed – Changes Needed

<table>
<thead>
<tr>
<th>Status</th>
<th>Witness Test Failed – Changes Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status Definition:</strong></td>
<td>A field Service Representative visited the service address of the respective project to perform a Witness Test and/or Net Meter. Unfortunately, issues were found that prevented the representative from setting the meter and the installation has been denied permission to interconnect. The project will not move forward until the requested changes are made.</td>
</tr>
<tr>
<td><strong>Communication Sent?</strong></td>
<td>Yes</td>
</tr>
</tbody>
</table>
### 7.12 Status: Amendment Check Required

<table>
<thead>
<tr>
<th>Status:</th>
<th>Amendment Check</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status Definition:</strong></td>
<td>An amendment document will be sent to the customer to confirm all updates made to the installation during the application process. The DocuSign package must be returned before the project is complete.</td>
</tr>
<tr>
<td><strong>Communication Sent?</strong></td>
<td>Yes</td>
</tr>
</tbody>
</table>

---

Last Modified: 2022-03-02
8. Project Complete

8.1 Status: Inspection Verification & FA Creation

<table>
<thead>
<tr>
<th>Status:</th>
<th>Project Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Definition:</td>
<td>The project has passed the Company Inspection and is granted Approval to Energize. At this time a survey will be sent to the contractor/installer as well as the customer.</td>
</tr>
<tr>
<td>Communication Sent?</td>
<td>Yes</td>
</tr>
</tbody>
</table>