Commonwealth Solar II Rebate Program

PowerClerk Online Application External User Guide

For Expedited Installers

Please note that Expedited Installers are now required to upload back-up documentation electronically in PowerClerk prior to submitting an application.

All files must be in PDF format only and must be 5MB or smaller.

All Applications must submit the following files:

- Signed Rebate Application
- Signed Version 9.0 Participant's Agreement
- Electric Bill (If new construction, please upload a file demonstrating a request for electric service has been received by the utility)
- Site Photos (including an aerial photo)

Additional documentation (public bidding documentation if you are submitting on behalf of a public project, or residential adder documentation if you are requesting the Moderate Home Value or Moderate Income adder) should also be uploaded at this time. For additional detail on required documentation, please refer to the Commonwealth Solar II Program Manual available at www.masscec.com/solar.

1. To Log in to PowerClerk:

Go to **www.powerclerk.com**

Note	PowerClerk will automatically log you off of the system after a certain period of inactivity. If you save your inputs along the way, this information will automatically be saved if you are logged out.

Your username and password will be delivered to you via Massachusetts Clean Energy Center (MassCEC) staff. If you have questions about your login information, contact the Commonwealth Solar team at cs@masscec.com.

2. To Change Your Password:

i. Login to your account
ii. Select the tab at the top of the screen "Administration"
iii. Follow the prompts to change your password

Note	If you have forgotten your Password, go to www.powerclerk.com and click "Forgot Password?" You will be prompted to enter your User Name (email address that you chose when your PowerClerk account was created), and a Password Reset email will be sent to that email address.

3. Additional Information:

More information on using PowerClerk can be found within the PowerClerk training video located on our website at:

http://web3.streamhoster.com/mtc/PowerClerk/MRET_Commercial_2_5.htm

We recommend that all expedited installers watch the training videos in addition to reading this user guide.

4. To Enter a New Incentive Application:

Under the *Applications* tab, choose the **Commonwealth Solar II Program** from the drop down menu.

Then select – "New Incentive Application"

Note	PowerClerk will take you through each page of the application. You can keep track of which page you are on by looking at the bar at the top of your screen. The first page will be called **Installer Selection**. You can move back and forth between pages, however, you must ***save your information*** before moving to another page, otherwise it will be lost.

A. Installer Selection

Applicant/Primary Installer/Integrator:
For the purposes of PowerClerk – whoever is completing the online application is the "Applicant". As a PV installer/integrator, the MassCEC has provided you with login information for a contact person at your company. After selecting your company from the "Applicant/Primary Integrator" drop-down list, select the Applicant contact person from the list to the right. Note that only one person from each company will be assigned login information.

Installer:
To add a secondary installer for this job, pick one from the drop-down list. If the secondary installer is an employee of the Applicant company, skip this step and leave "Installer" blank. If your secondary installer is not listed, please email cs@masscec.com to request a **Secondary Installer Contact Information** form.

To continue, select "Next" (note: on some screens you will not have the option to select "Save". If there is **no** option to "Save" on the screen, PowerClerk will automatically save that information when you select "Next".)

B. Customer Contacts

Contact Details:

Complete this section with the contact information for the electric ratepayer for the project site; this will be considered the Host Customer. This may or may not be the System Owner.

Note	Remember to "Apply Changes" before moving on.

To add another applicant contact, select "Add a Contact".

Please provide Phone Number and Email Address for your customer. Make sure that you enter valid information, since PowerClerk will not let you save incomplete data entries.

Note	You will not be able to submit the application if the host customer does not have an email address.

Note	Communications regarding the status of applications will be sent to Applicant/Installers, Host Customers and System Owners via email throughout the rebate approval and payment processes. Please ensure that any email addresses provided are current and accurate. Please note that it is the Primary Installer's responsibility to provide email addresses for the all parties in the original application.

To continue, select "Next".

C. Host Customer Addresses

When entering the address, be sure to indicate if it is the mailing address or the site address, or both. Both mailing address and physical address boxes will be checked when you start. If there is a separate mailing address from the project site (physical address) be sure to enter one of the addresses first, check the box that applies (mailing or physical), then select "save address" and then select **"**Add New Address**"** in order to enter the second address.

Note	*Be sure that the city or town listed as the Project Site is one of the Official Massachusetts Town/City names.* See http://www.sec.state.ma.us/ele/eleclk/clkidx.htm.

Note	While the physical address must be one of the Official Massachusetts Town/City names, the mailing address is not required to be an official Town/City. The mailing address should not be listed as one of the official towns if it will affect the ability to send mail to the mailing address.

Select “Save Address” before continuing.

To continue, select “Next”.

D. System Owner

If the System Owner is the same as the Host Customer, choose Host Customer from the "System Owner Is" list provided. If the System Owner is a Third Party, enter information for the owner of the system.

Note	If you are entering more than one application for the same Third Party Owner, please standardize the name of the Third Party Owner. Any variations in this name will create delays in reviewing, processing and approving your applications.

To continue, select “Next”.

E. Payee

For the purposes of the Commonwealth Solar II Rebate Program, the Payee can either be the Host Customer, the Third Party Owner, or the Applicant/Primary Installer.

If the Payee is the Host Customer, choose “Host Customer” from the first drop down list.
If the Payee is the Third Party, choose “System Owner” from the first drop down list.
If the Payee is the Applicant/Primary Installer/Integrator, select “Other Party” then choose “Fill items on page with information from: Applicant”.

The Payee information will fill in for you. If the payee information is not correct, please enter the correct information.

Note	The Payee can only be one of the above listed entities. The Payee cannot be the secondary installer/subcontractor, or another entity.

Note	Please double-check for accuracy

To continue, select “Next”.

F. Customer Site Information

Utility Company: Choose the host utility company from the drop down list.

Utility Sector: Choose "Commercial" for applications seeking a Commercial Rebate incentive.

Choose "Residential" for applications seeking a Residential Rebate incentive.

Note	***If the project is a residential third-party ownership, residential solar leasing, or a residential new construction of more than a single home by a developer, choose "Commercial" for the application and "Residential Solar Lease" for the subsector. If the project is part of a Community Solar project, choose "Commercial" for the application and "Community Solar" for the subsector.***

Utility Subsector: Choose the appropriate subsector for the Host Customer. This field is required for submission.

To continue, select "Next".

G. Project Site

This section allows you to apply for any additional incentives (above and beyond the base incentive) that your customer might qualify for. Please select the box next to any applicable adders. Verifying documents are required to be submitted electronically along with the signed paper application in order to qualify.

Electric Rate: Please note the electricity rate code for the host customer. (e.g. A1, R2, etc. Usually one letter and one number)

Production Tracking System Reporter: System Owners receiving a Commonwealth Solar II rebate are encouraged but not required to report production to the Production Tracking System. If they plan on selling SRECs, it is important to enter a PTS Reporter. Systems that plan to report manually can select "Owner" from the drop-down list. Systems that will report automatically should select the Data Acquisition System that will report production to the PTS.

H. Project Components

Note	You will need to save your work several times while completing this page. There are several points where PowerClerk will need to make computations, at which point the screen will go grey and you will need to wait until the screen updates. This page may take several minutes to complete.

Step 1 - Inverter:

First, select the Manufacturer of the Inverter for the project. If you are using more than one inverter, you will be able to add the quantity. **If you are using more than one inverter that is a different size or made by different manufacturer, you will need to add each inverter separately, with number of panels associated under each inverter.**

Next, select the Model of the Inverter for the project.

Next, input the quantity of inverters.

Next, input the cost of the inverters (PowerClerk will update once you click anywhere on the screen or hit “enter”).

Select “Save” in the upper right hand corner of the box.

Once this updates, you will have the opportunity to add another Inverter if necessary by selecting “Add Inverter.”

Step 2 - Modules:

First, select “Add PV Modules” (allow PowerClerk to update by clicking the screen or hitting “enter”).

Next, select the Manufacturer of the Modules. If your project has more than one array and the arrays are at different azimuths or tilts, you will need to add these arrays separately.

Next, select the Model of the Modules.

Next, input the quantity of panels for this array tied to the inverter. If there is a second inverter of a different size, be sure to note step 3 below. If there is more than one array with different module manufacturers, model, azimuth, or tilt, you will have to complete this array first and then add another with the other specifications.

Next, input the cost of the modules (PowerClerk will update).

After PowerClerk has updated, select “Save” in the upper right hand corner of the box.

Note	The size of your system may not exceed 15kW.

Step 3 – Second Inverter (If there is a second inverter that is a different size than the first inverter imputed in Step 1)

Proceed using Step 1 above, noting specifications of second inverter

Next, proceed with Step 2 above, noting the correct number of modules that are associated with the second inverter.

Step 4 Installation

Tracking, Array Azimuth, and Array Tilt: You do not need to complete this portion of the PowerClerk application.

Shading Analysis:
You do not need to enter shading information in this part of the PowerClerk application.

Step 5 - Add Installation Costs

You must provide the total installation cost for the project. If you have previously input the cost of the inverter and modules, you must also include the additional costs for labor, materials, etc. to capture the total cost.

First, select “Add Other”.

Next, Component should read “System Costs”.

Next, under the Manufacturer drop down list, choose “Installation Costs” (PowerClerk will update).

Next, under Model, choose “Balance of System” from the drop down list.

Enter the total remaining project cost in “Total Cost.” Note: If you did not previously input costs of individual components, then this value will be the entire system cost.

Select “Save” in the upper right hand corner (PowerClerk will update).

Step 5 – Incentive

If you make changes to the MA Manufacturer Adder or components after entering in the components the rebate requested will change. You will see a note which says “Calculated Incentive Differs from Stored Incentive.”

Select “Save” and this will update.

Select “Done” in the upper right hand corner.

To continue, select “Next”.

I. Application Review

You should review all project information for accuracy on the “Application Review” tab. Before continuing to the next page and submitting your application in PowerClerk, you must print the application form and have all parties sign the file. You will need to attach a PDF copy of the signed application record on the next page before you can submit your application in PowerClerk.

J. Paperwork Record to Submit Electronically

There are required back-up documents that you must submit with your application before you can submit your application in PowerClerk. Please note that all files must be in PDF format only and must be 5MB or smaller.

All applications must upload the following documentation:

Application Form: Signed PowerClerk Application. Per the instructions above, the PowerClerk application needs to be printed and signed by all parties. Please note that all parties must provide an original signature.

Attachment B: Signed Commonwealth Solar II Participant's Agreement. Please note that all parties must provide an original signature.

Copy of an electric bill for the project location or evidence of site control required for new construction. The customer's Rate Code must be clearly displayed and the service address must match the site address on the application.

Site photographs – 7 minimum required:

- 1 photo of the PV project location taken from the south looking northward toward the building or site.
- 1 aerial image of the site from Microsoft Virtual Earth, Google Earth, or similar source with the building or site clearly identified.
- 5 photos *clearly labeled indicating the direction that the camera is pointing* showing a 180 degree panoramic view starting east, through south, and ending west, that are taken from the PV project location. 180 degree view photographs with a superimposed sun path grid will also be accepted (e.g., *Solar Path Finder, Solmetric SunEye™, etc.).* 1 aerial image of the site from Microsoft Virtual Earth, Google Earth, or similar source with the building or site clearly identified.

Applications seeking adders should submit additional applicable documentation:

MA Company Components:	Must be indicated on the Technical and Cost worksheet, no additional documentation is required.
Moderate Home Value:	Attach a copy of the Applicant's most recent property tax bill (FY11). **Also, must provide** documentation verifying project site as primary residence (i.e. copy of voter registration, driver license, etc.)
Moderate Household Income:	**DO NOT submit personal Tax Documents to MassCEC!** Attach letter of income eligibility from Spillane Consulting Associates. For more information: **www.scapartnering.com/cec.php**. **Also**, provide documentation verifying project site as primary residence (i.e. copy of voter registration, driver license, etc.)

Evidence of Energy Efficiency Requirement:
(See Commonwealth Solar II Program Manual for details). Do NOT check this box unless the paperwork is being uploaded.

Additional items listed will be required at the time of Project Completion. You do not have to submit these documents now.

To continue, select “Next”

K. Non-Expedited Installers

Note	Non-Expedited Installers will proceed with application submittal by emailing back up documents to the MassCEC. MassCEC must receive supporting documents electronically within ten (10) calendar days of the application’s initial electronic submission. Please send these materials to cs@masscec.com with the subject line “CS II Block 7 Application for CS2-(Application Number)” (Note: please submit pictures as JPEGs).

Attachment A-1 or A-2: Signed and completed Commonwealth Solar II Application Form
Please note that Attachment A-1 and A-2 should be completed and returned by Non-Expedited Installers only. Expedited Installers should print the complete PowerClerk application visible in the “Application Review” tab in lieu of completing Attachment A-1 and A-2. Please note that all parties must provide original signatures. An application will not be accepted if signatures are missing.

L. Application Review

Please review your application for inaccuracies and make any adjustments as needed.

PowerClerk will prompt you if there is required information missing. This prompt is found at the bottom of the page above the submit button which will be grayed out. This information must be included in order for you to submit your application.

Once all items are complete, select “Submit Incentive Application.” PowerClerk will generate your Commonwealth Solar ID number at this time.

5. To View a Previously Submitted Application:

Find the application you would like to view, note the status of the application. Next to the status, there may be some notes from MassCEC detailing the reason for the status change.

Possible Statuses:

Not Submitted: The application has been created in PowerClerk, but has not been submitted.

Submitted: You have electronically submitted your application including uploading applicable back-up documentation.

Under Review: MassCEC has received back-up documentation and is reviewing the materials.

Application On Hold: An item needs clarification on the application and MassCEC will contact you for more information. The application will not be approved until these issues are remedied.

Installer on Hold: The PV Integrator cannot submit applications for some reason, including but not limited to, the installer is still under the "Crawl Before You Walk" process.

Denied: The application is incomplete or does not meet our requirements.

Withdrawn: The application has been withdrawn by the System Owner before it was approved for a rebate.

Review Complete: The application has been reviewed and will go through the Approvals Process. This process may take an additional two weeks.

Approved: The application has been approved. An Award Notification will be sent to the Host Customer, the Applicant/Primary Installer/Integrator and the System Owner.

Forfeited: The award was forfeited by the System Owner after the award was Approved.

Rescinded: The award has been rescinded by MassCEC for various reasons after Approval (e.g. Deadline for installation was not met and System Owner was unresponsive when contacted).

Payment Request Received: Project completion paperwork has been received, but has not yet been reviewed.

Payment Request On Hold: Project completion paperwork has been received but items are missing or the project is waiting for additional issues to be resolved (i.e. waiting for site inspection to be completed; waiting for DAS to report to PTS).

Payment Request Approved: Payment has been approved and is waiting for the required approval before being sent for check processing.

Completed: The project has been approved for final payment, received all necessary approvals and the check is being processed.