NEM Applicant User Guide

SCE Online Interconnection Application System

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SOUTHERN CALIFORNIA
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Introduction and Key Concepts

Introduction

The SCE Online Interconnection Application System (Online Application System) is a hosted web program used for entering and managing Net Energy Metering (NEM) interconnection applications end-to-end, from initial submittal to issuance of the Permission to Operate (PTO) letter.

A customer seeking to interconnect their renewable energy generating facility with SCE's electric grid can fill out an online application and review their application status throughout the process.

SCE has contracted with Clean Power Research to assist SCE with managing our customers' NEM interconnection applications. Thus, the SCE and PowerClerk® Interconnect logos will appear throughout the Online Application System.

The Online Application System is built upon the PowerClerk Incentives platform, the industry-leading software platform for renewable energy incentive processing. The PowerClerk Incentives processes 70 percent of the solar (PV) incentive applications (by volume) in the United States and manages other technologies including solar hot water/solar thermal, small wind and small hydro.

Supported Browsers

The Online Application System will officially support the current major version and one previous version of Internet Explorer, Firefox, Chrome, and Safari. This is identical to Google's browser support policy.

Additional Help

Additional assistance is available at www.sce.com/nem or contact a NEM customer care representative at customer.generation@sce.com or (866) 600-6290.

Applicant Experience

Log-In Page

Navigate to URL page: https://sceinterconnect.powerclerk.com

Account Creation

1. Applicants can self-register for accounts in the Online Application System as shown in Figure 1.1. Applicants must enter all required information and provide a valid email address to request an account. Email verification is required prior to being able to login.
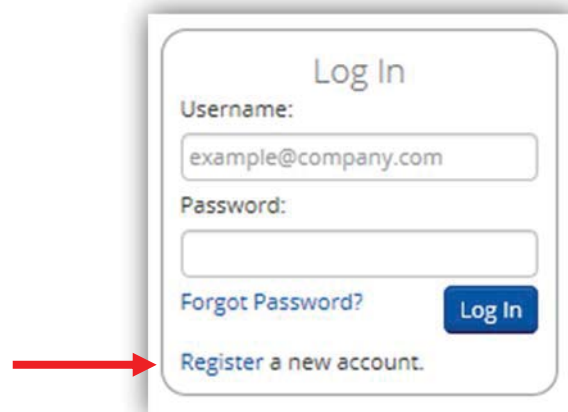

Figure 1.1 Applicant Self-Registration

2. When an account is requested, a verification email is sent to the applicant to confirm the email address. Applicant must check his or her email for a message from "SCE Accounts" donotreply@powerclerk.com.

3. Clicking on the link will confirm registration and prompt the applicant to create a password.

   Password requirements: Password must be at least 8 characters long and include at least one uppercase letter, one lowercase letter, and one number. After successful creation of password, the applicant will be routed to the log-in page.

4. Enter applicant credentials. "Username" is the applicant's email address.

Password Reset

Password Reset is available by clicking on the "Forgot Password?" link in the Log In page.

Landing Page

Once the applicant's user account has been set up, the applicant can log in to submit new interconnection application(s) or check the status of existing application(s).

Upon log in, a list of applications will be visible. Applicant will only have access to application(s) submitted that user account and for applications where they are *granted access* by another user, as shown in Figure 1.2. The **grant access** feature is located in the "Settings" menu.

Note that the **columns** (e.g., Project #, Current Status Timestamp, etc.,) can be sorted in ascending and descending order, as desired to be displayed on this page. The **search box** will search any of the column contents in the application list.
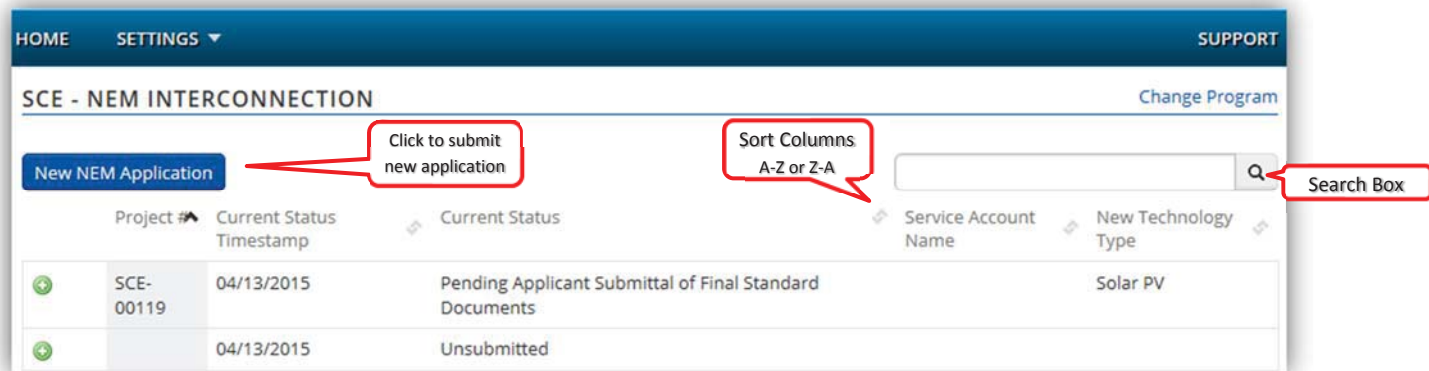

Figure 1.2 Home Page with List of Applications

Submitting Applications

Required data fields are marked with a red asterisk throughout the application.
Blue dots 🔵 reveal **helpful tips** for guiding you through the application.

It is recommended to provide as much information requested as possible to ensure the most efficient processing. The electronic application will not be accepted if any required data is missing.

1. From the home page, the applicant begins filling out a new application by clicking the "New NEM Application" button as shown in Figure 1.2.

2. The interconnection application form will provide additional instructions and a series of steps to be completed. The interconnection application will look similar to Figure 1.3 below.
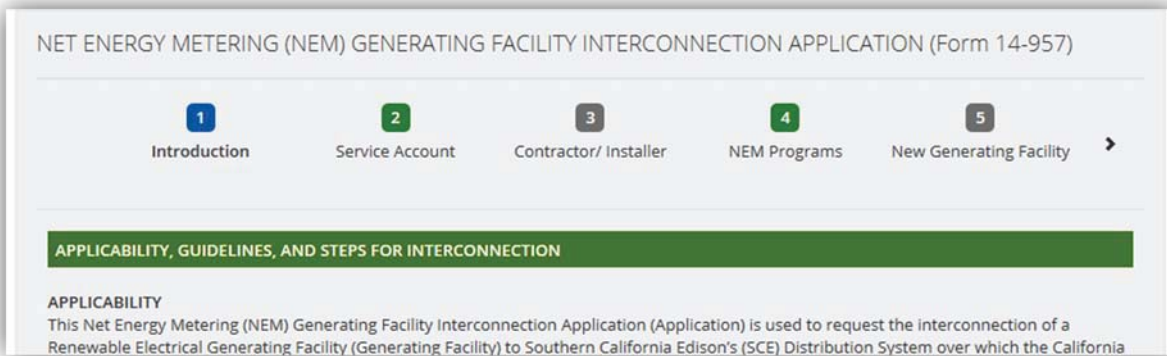
Figure 1.3 Example Application Form

3. Information entered into the interconnection application is automatically saved each time the applicant clicks on the "**Next**" button at the bottom right corner of the form. *Note: Data may **not** be saved if applicant navigates away from the application without clicking on "Next" (for example, applicant should click on Next before clicking on Home).*

Incomplete Applications

Incomplete or **unsubmitted** applications are saved and the applicant may return at any point in the future.

1. When applicant returns to home screen by clicking on "Home," a line item for the incomplete application will be shown in "Unsubmitted" status. If there are multiple applications, use the keyword search and enter the Project # or any keyword for the application. Then click on the green button to expand the project menu as shown in Figure 1.4 below.
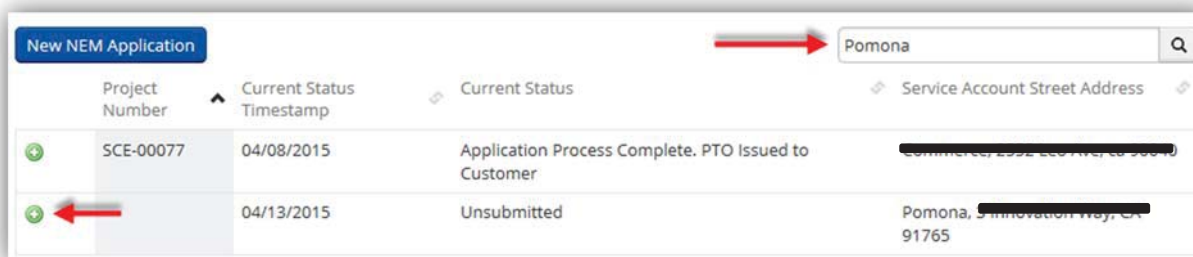

Figure 1.4 Search for Applications

2. Click on blue "NEM Application" button to continue filling out the application as shown in Figure 1.5.
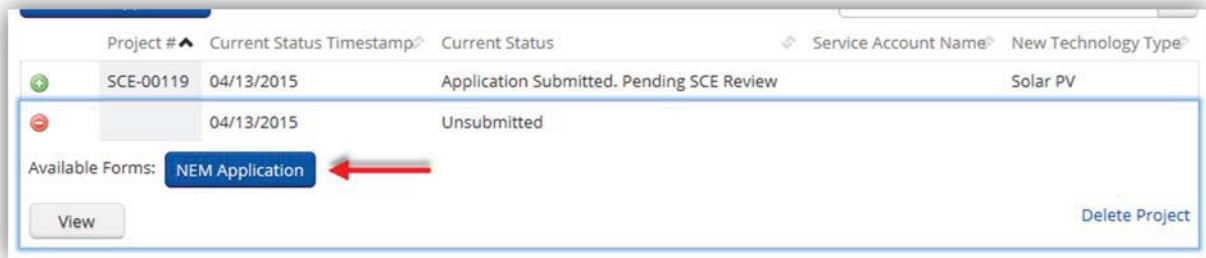
Figure 1.5 Edit Unsubmitted Application

Note: Clicking on the "View" button allows the applicant to view the application but not edit it.

3. When finished, click the "**Submit**" button on the very last page.

    ERROR: Anytime required information is missing, the application will not be accepted and the following error message will appear as shown below in Figure 1.6. Navigate back to the application with empty data fields that are marked with a red asterisk, complete the fields and return to the last page and hit "**Submit**."
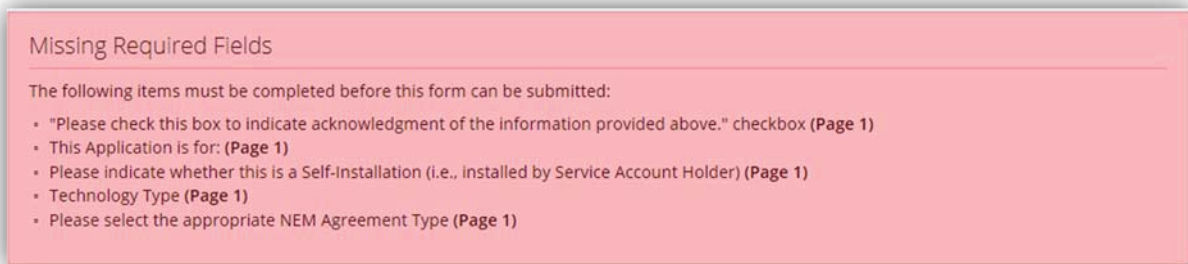

Figure 1.6 Error: Missing Required Fields

Solar PV Calculator

For applicants seeking to interconnect Solar PV, projected PV annual performance is calculated based on the information provided in the application. Applicant would select from a dropdown list of equipment make and model. This list is synchronized with CEC PV certified equipment, as listed on http://www.gosolarcalifornia.org/equipment/. Applicants can enter multiple inverters and arrays, as applicable, for the calculation. See Figure 1.7 below.

In this example, the estimated annual production (kWh), DC rating and CEC- AC rating, are calculated using specifications from the CEC equipment list as well as the system location, orientation, and shading. For solar equipment not found on this list, applicant will need to select "Solar PV (Equipment Not Listed)" under "Technology Type" to enter freeform equipment information and manually calculate information requested in the application.

Figure 1.7 Example of Solar PV Equipment and Calculation

Upload Documentation

All interconnection applications require supporting documentation to be uploaded into the Online Application System. Applicants can upload electronic attachments directly into the application form from their web browser. Electronic attachments marked with a red asterisk are required to be uploaded prior to submitting application.

1. Click on "Browse" and select document to upload. Documents can be previewed in the Online Application System. See Figure 1.8 shown below.

    Attachment Requirements: Electronic document attachments must be in PDF or docx format and no greater than 5MB per attachment.

Figure 1.8 Electronic Attachments

Generate Documents

Applicants can generate a printable Interconnection Application or Interconnection Agreement auto populated from data submitted by applicant.

1. Click on the "Generate Document" button as shown below in Figure 1.9.

2. Immediately, a message from the browser will prompt the applicant to download the document and click on "Open" or "Save", also shown in Figure 1.9.

3. **ERROR**: If clicked on "Cancel", applicant will need to repeat steps 1 and 2 above.
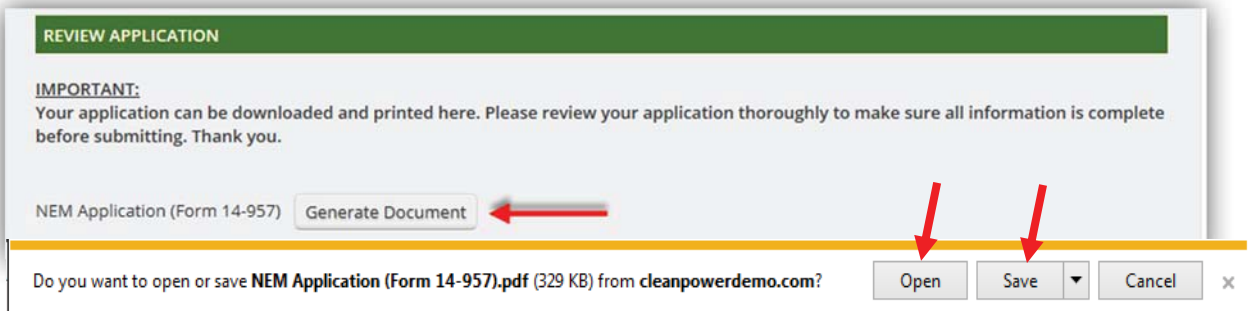

Figure 1.9 Generate and Download Document

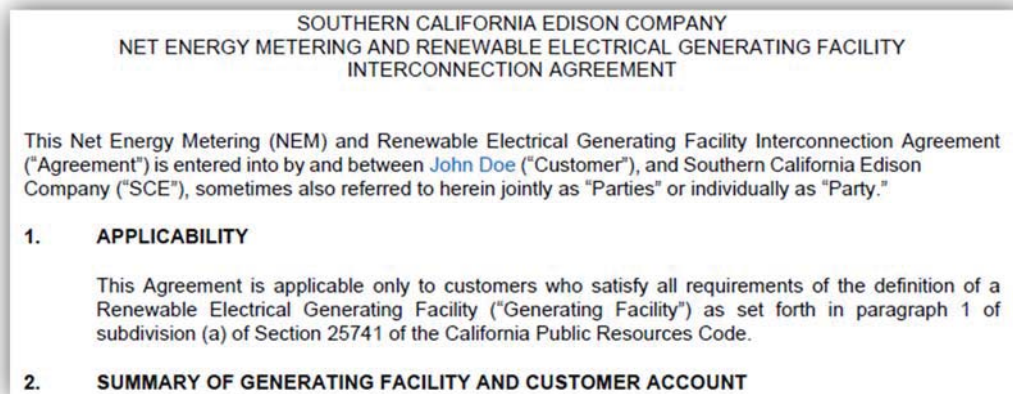4. The document will be generated with applicant's data input in the standard PDF format as shown below in Figure 2.0.

Figure 2.0 View Generated Document

Applicant Post-Submission Experience

A complete list of submitted applications with current status of each application is available in the Landing Page, as shown in Figure 1.2. Once an application is submitted, the applicant may view the application at any time by clicking on the "View" button, as shown in Figure 1.5. Submitted applications are not editable unless the SCE administrator returns the application into an applicant-editable state.

Returned Applications

In the case where an application is placed in the "***Application Returned. Pending Applicant Corrections***" status, an email notification will be sent to the email addresses provided and an electronic "Resubmittal Application" form will be made available for the applicant to edit.

1. Log in to the Online Application tool and click on the project to reveal the forms available for editing as shown in Figure 2.1 through 2.3 below.
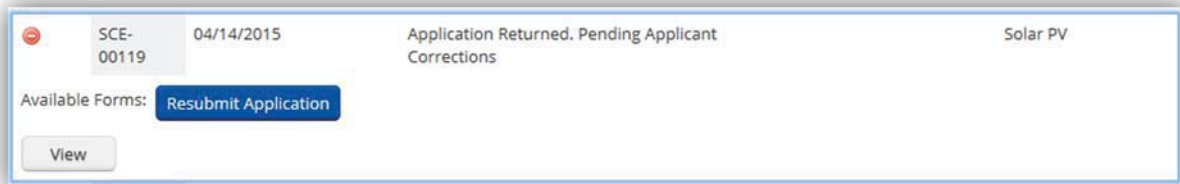

Figure 2.1 Available Forms: Resubmit Application/Corrections

2. Click on "Resubmit Application" **and modify only the information requested by SCE personnel.**

Submit Final Inspection, Agreement, or Final Documents

At any point in the interconnection process, the final inspection and interconnection agreement can be submitted. Follow steps one and two above to submit additional documentation. Any document previously attached will be available for viewing.
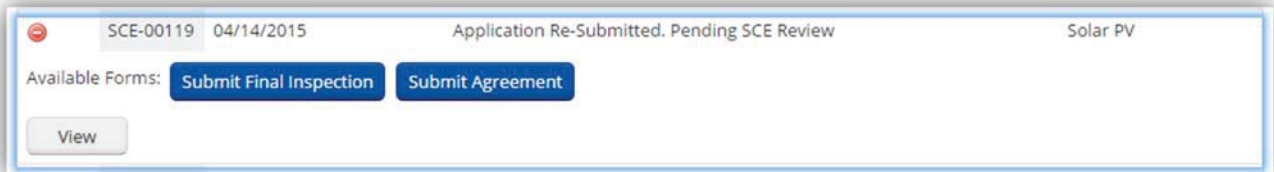

Figure 2.2 Available Forms: Submit Final Inspection and Agreement
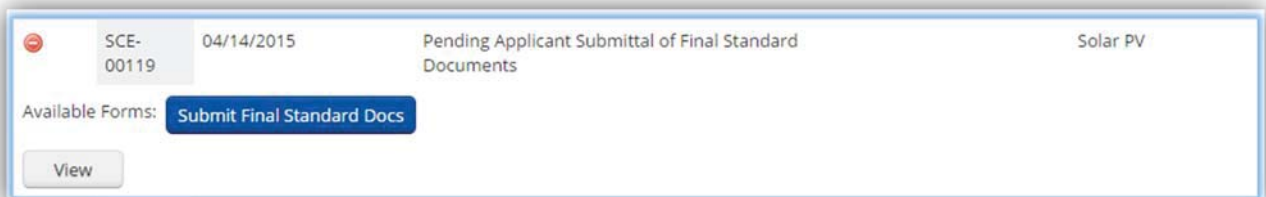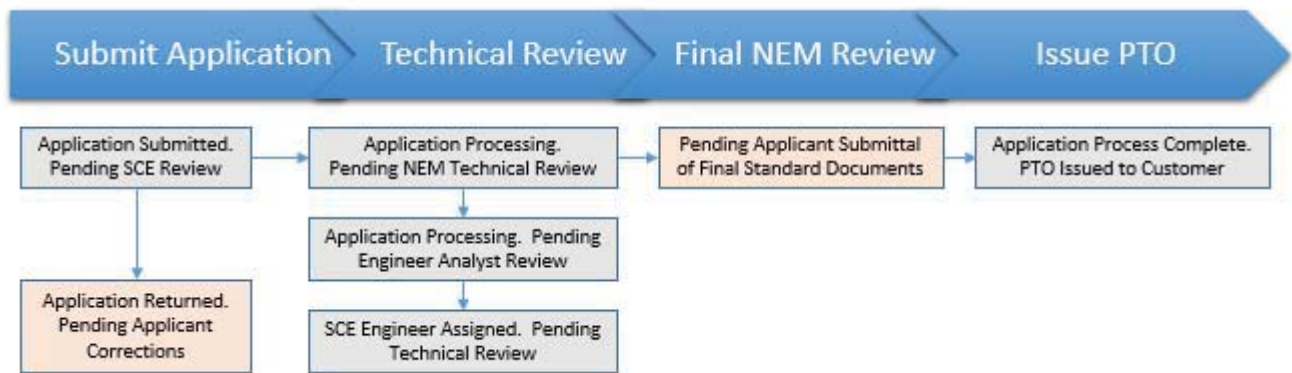

Figure 2.3 Available Forms: Submit Final Standard Documentation

Online Application Process Overview

Note: This illustration has been simplified to display the overall process.

Application Status Definitions

"Application Submitted. Pending SCE Review" – This is the initial state of the interconnection request, or "application." The application is awaiting review by SCE personnel.

 "Application Returned. Pending Applicant Corrections" – Indicates that the interconnection application has been submitted and not accepted by SCE for reasons such as, insufficient information or corrections are required for further processing.

"Application Re-Submitted. Pending NEM Review" – The application has been resubmitted by the applicant and is awaiting review by SCE personnel.

"Application Processing. Pending NEM Technical Review" – The application and single line diagram has been reviewed and is considered valid and complete. The technical information provided is currently undergoing further review by SCE personnel.

"Application Processing. Pending Engineer Analyst Review" – The application has been forwarded to an SCE Engineer analyst for further review.

"SCE Engineer Assigned. Pending Technical Review" – The application has been forwarded to an SCE Engineer for further review.

"SCE Engineer Review. Pending Applicant Response" – The application is undergoing review by an SCE Engineer and additional technical information is required from the applicant.

"Applicant Response Received. Pending SCE Engineer Review" – The application is awaiting review by an SCE Engineer.

"SCE Engineer Review Complete. Pending SCE Commissioning Test" – The application review by an SCE Engineer is complete and awaiting commissioning test results.

"SCE Engineer Review. Pending SCE System Upgrades" – The application review by an SCE Engineer is complete and awaiting system upgrades performed by SCE.

"Commissioning Test Failed. Pending Applicant Response" – The commissioning test failed and additional information is required by an SCE Engineer.

SCE Technical Approval Complete. Pending Final NEM Review" – The application has received technical approval and awaiting final review by SCE NEM personnel.

"Pending Applicant Submittal of Final Standard Document" – The application is undergoing final review and is missing additional documentation (for standard NEM applications) required for issuing PTO.

"Pending Applicant Submittal of Final Specialty Project Documents" – The application is undergoing final review and is missing additional documentation (for non-standard or "specialty" NEM applications) required for issuing PTO.

"Final Documents Submitted. Pending Final NEM Review" – Additional documentation has been received and awaiting review by SCE NEM personal during the final review stage for PTO.

"Application Process Complete. PTO Issued to Customer" – The application process has been completed and a Permission to Operate letter will be mailed to the customer.

"Withdrawn" – This application has been removed from the SCE NEM queue and is no longer being processed.

"Transferred to GICD" – This application has been transferred to the Grid Interconnection and Contract Development department for processing.

Key Terms

An **applicant** is a party responsible for managing interconnection request data via Online Application System, either the SCE customer or a representative of the interconnection customer, such as a contractor or installer.

A **project** is a submitted item in the Online Application System.

A **required** data field is a data element required on the interconnection application. Required data fields are marked with a red asterisk throughout the application.

A **status** is the state or condition of the interconnection application. Projects move through a set of statuses specified by SCE reviewers. The list of statuses and the flow between statuses is defined per-program and configured by the SCE administrator.

Additional Features

API

Integration with other non-SCE IT systems is available, through an Application Programming Interface (API). The API is a standards- based web service. It is a "REST" (REpresentational State Transfer) web service over HTTPS (Hypertext Transfer Protocol Secure). T h e Online Application System includes API support for data manipulation including: submitting a project form, updating project data, and retrieving project data.

Any integration between the Online Application System and customer's internal systems will be handled outside of SCE's realm and **at the discretion of the customer and Clean Power Research**.

Electronic Signatures

At this time the feature to allow the applicant to digitally sign the Interconnection Agreement is not enabled. This feature will be part of a planned upgrade sometime in the future.

Security

The Online Application System employs industry standard security practices, including:

- All account access is secured username and password.
- All web site access is encrypted with SSL.
- Applicants only have access to data for which they have permission.
- Firewall at data center. Daily network vulnerability scanning performed by McAfee Security.