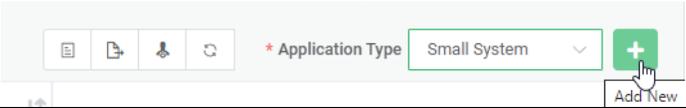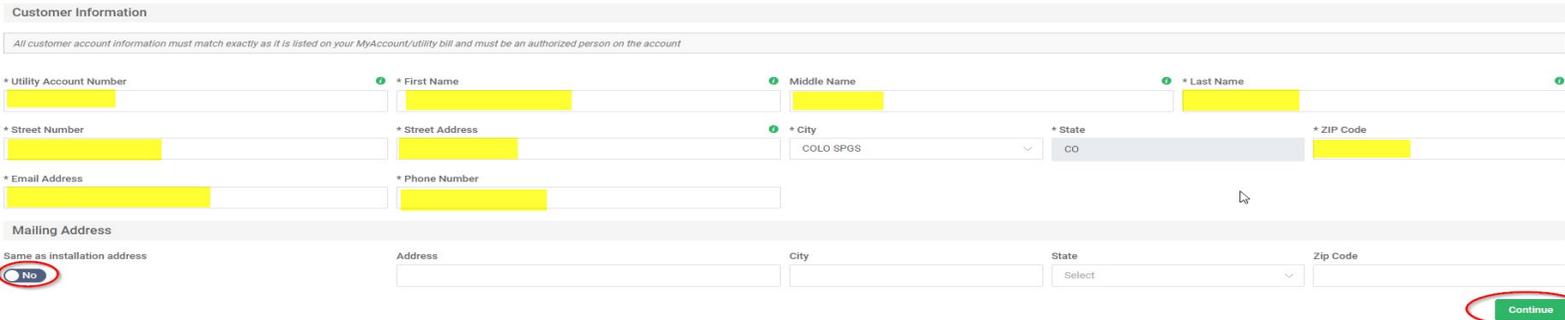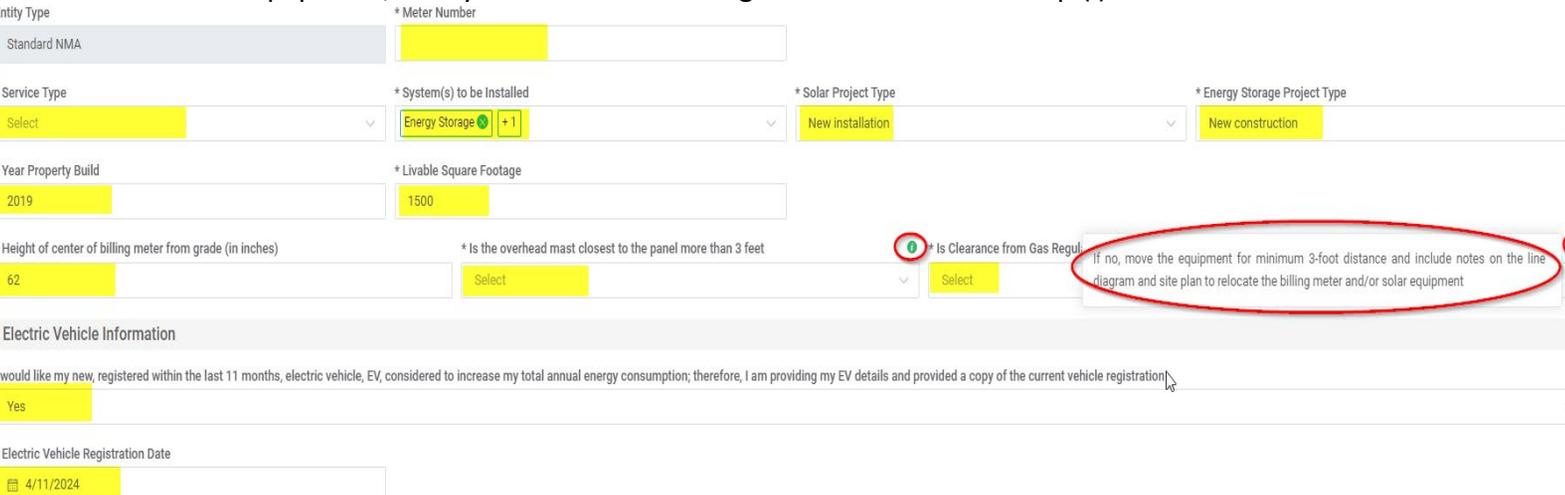## How to Add Create a New "Connecting Solar" Application

Description: This guide provides step-by-step instructions for creating a new interconnection application in Connecting Solar's eTRACK+ portal. It explains how to quickly and easily set up a new application for review. There are four required pages to complete before you can submit the application.

Quick Reference Guide

Step	Action
1. Create a new application.	Log in to your account. Select "Small System" and click on the plus (+) to Add New.
2. Step through each section.	There are four sections to complete. Start with the customer information section. All fields marked with an asterisk (*) are required. Highlighted fields are specifically required for tutorial purposes.
3. Project Name	Add a project name that is meaningful to you for this installation.
4. Select Installer.	Enter the name of the company you work for, then click on it to select.

5. Fill in Required Customer Information Fields	The data you enter is verified through the customer information system. If you receive an error on a field, ensure the spelling matches what is on the utility account or bill. If the mailing address is the same as the installation address, toggle the Mailing Address option to "Yes" to auto-populate the address. Then, click the "Continue" button. Customer Information *All customer account information must match exactly as it is listed on your MyAccount/utility bill and must be an authorized person on the account* * Utility Account Number * First Name Middle Name * Last Name * Street Number * Street Address * City [COLO SPGS] * State [CO] * ZIP Code * Email Address * Phone Number Mailing Address Same as installation address [No] Address City State [Select] Zip Code [Continue] **Note:** If the customer's middle initial or name is listed on the account, it is required. This information is used to validate the customer account details.
6. Fill in the required General Information Fields:	Select the service type: either commercial or residential. For the system(s) to be installed, choose battery, solar, or both, as applicable. Note that "No" is not an option for the overhead mast distance or the gas regulator. If either is closer than 3 feet from the solar equipment, the system must be redesigned. Refer to the tool tip (i) for more information. Entity Type [Standard NMA] * Meter Number * Service Type [Select] * System(s) to be Installed [Energy Storage ⊗ +1] * Solar Project Type [New installation] * Energy Storage Project Type [New construction] * Year Property Build [2019] * Livable Square Footage [1500] * Height of center of billing meter from grade (in inches) [62] * Is the overhead mast closest to the panel more than 3 feet [Select] * Is Clearance from Gas Regul... [Select] (i) If no, move the equipment for minimum 3-foot distance and include notes on the line diagram and site plan to relocate the billing meter and/or solar equipment Electric Vehicle Information I would like my new, registered within the last 11 months, electric vehicle, EV, considered to increase my total annual energy consumption; therefore, I am providing my EV details and provided a copy of the current vehicle registration [Yes] * Electric Vehicle Registration Date [4/11/2024]

7a. Enter interconnection equipment - inverter.	Inverter information is required for all installations. Click "New" to enter the inverter details. Use the magnifying glass icon to search the California Energy Commission (CEC) database. You can filter the results by entering the manufacturer or model.
7b. Enter interconnection equipment- solar and energy storage.	Enter solar panel and energy storage equipment details. Add one "solar" entry per array.

	Once all equipment is entered select "continue" in the bottom right. **NOTE:** All equipment requires listed in the (CEC) California Energy Commission.
8. Document upload	All supporting documentation is required. Each upload should be a single page. The site plan and line diagram must each be one page per document and in PDF format. Other documents can be in image formats (jpeg, jpg, png) or PDF. Drag and drop files into the designated area or click within the box to open the file explorer. Once all documents are uploaded and display a green file name with the comment "upload complete," click the "Submit" button.
9. Application and net metering agreements	The green dots at the top of the page show the system is working. The system processes the documents into signable PDFs for the installer and customer to complete.

	After the documents have generated at the bottom of the document page, select "Send Agreement for e-Signature" to proceed.
10. E-sign the system generated documents	Sign the system generated net metering agreement and interconnection application to start the review process. This step will apply the application fee on the customer account.

Notifications sent via email:

- **eSignature:** The installer and customer will receive emails requesting eSignature after successfully completing the application packet. Once the documents are signed, a thank you email will be sent, followed by the executed documents once both parties have completed the signatures.
- **Status updates:** Installers will receive status updates for each step of the review process, including: in review, rejection, approval, permit number required, permit number added successfully, and permission to operate (PTO).
- **Reminder notifications:** Installers will receive reminder emails for: unsubmitted application, permit number missing, permit added without PPRBD ES, complete notification, and pending signature.