Using the customer portal

Description: This guide explains how to create a new customer account, transfer ownership, and opt into rollover in the online customer portal.
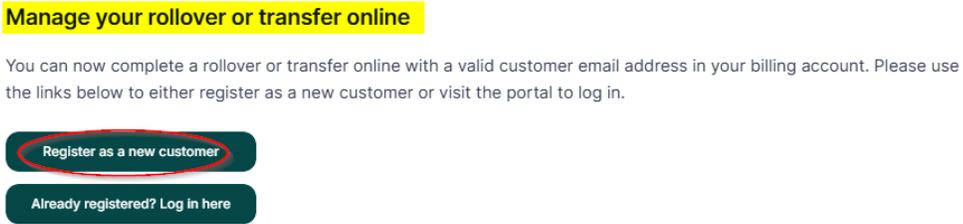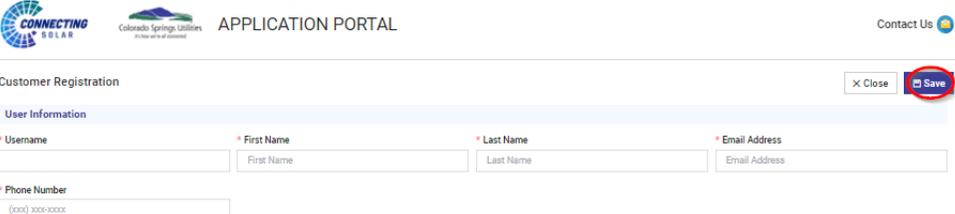
Customers can register by creating a login and setting a new password, which grants access to the customer dashboard. From the dashboard, customers can create applications for ownership transfer, net metering agreements, or request the optional rollover.
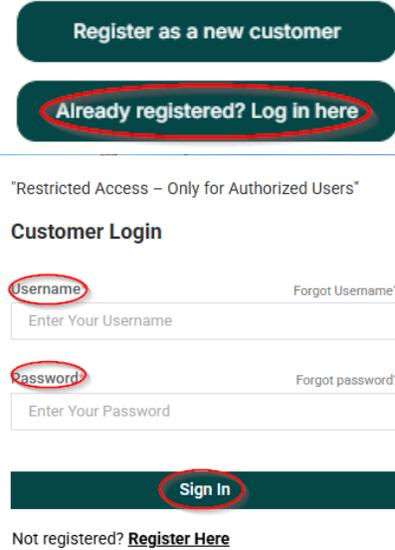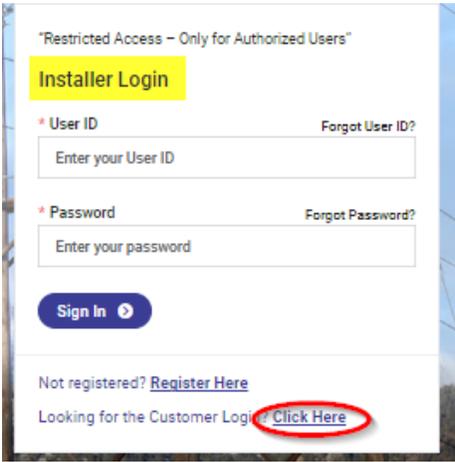
Section topics:
- ➤ Setting up an account
- ➤ Moving into a home with solar (renting or buying)
- ➤ Optional Rollover

Quick Reference Guide

Setting up an account

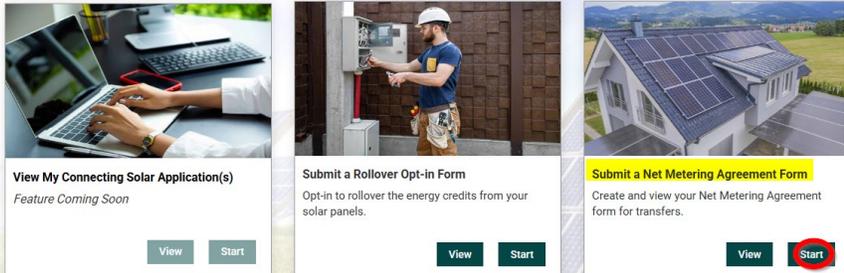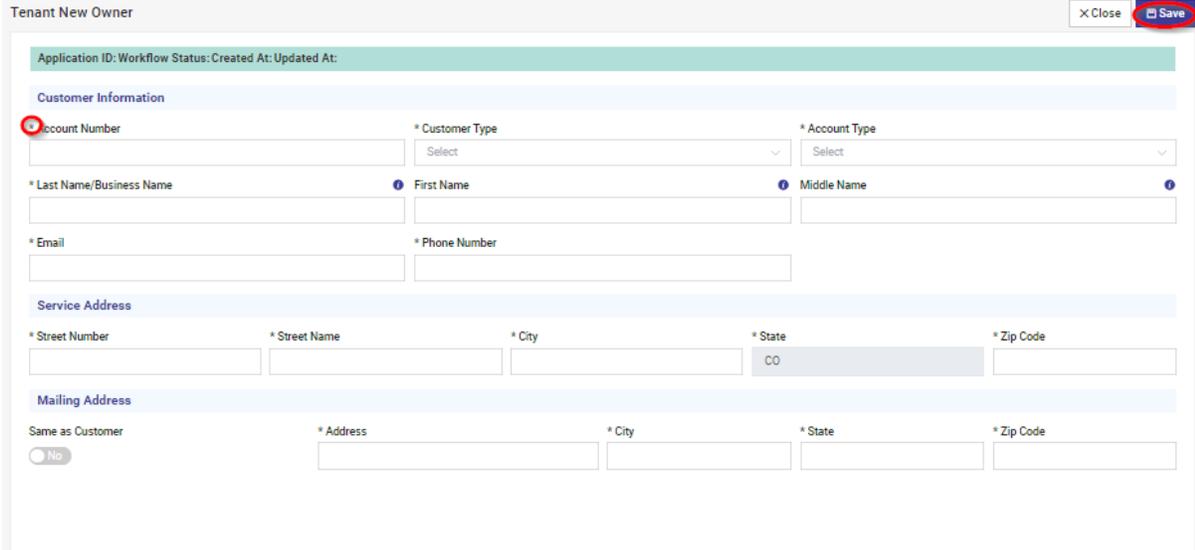| Step	Action
1. Navigate to the registration link.	Visit the Connecting Solar website and navigate to the register and login links under the title "Manage your rollover or transfer online." Then, register to set up the account at csu-customerportaluat.anbetrack.com. **Manage your rollover or transfer online** You can now complete a rollover or transfer online with a valid customer email address in your billing account. Please use the links below to either register as a new customer or visit the portal to log in. Register as a new customer Already registered? Log in here *Note: The solar application function will not be available until mid-2025. Please only utilize the link for rollover and transfers.* • For best results with the app use Microsoft Edge.
2. Creating an account.	Set up a new account. Complete all the section. The asterisk denotes a required field. Click save to complete the registration. CONNECTING SOLAR Colorado Springs Utilities APPLICATION PORTAL Contact Us Customer Registration X Close Save User Information * Username * First Name * Last Name * Email Address First Name Last Name Email Address * Phone Number (xxx) xxx-xxxx • Enter data as it appears on your utility bill, as it may differ from the information in the "MyAccount" portal.
3. Email communication.	An email will be sent to the provided address to set up your password. Follow the instructions and log in via the email link.

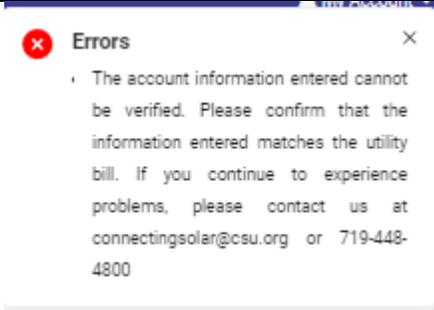|	
	Requirement: The email must match your billing account. Contact customer service to update it if necessary at 719.448.4800.
4. Account log in.	Navigate to the links in step 1 and click on "Log In" to access your account. • If a solar installer created an application for you, your User ID will be the address associated with your billing account. • Accidently clicked on the installer login button? Click "Looking for customer login" to redirect.

Moving into a home with solar?

When moving into a home with solar, it's important to set up a new net metering agreement. This ensures you receive credit for excess solar generation on your electric bill.

Step	Action
1. Open the dashboard.	To access the dashboard, navigate to the customer log in page and sign in.

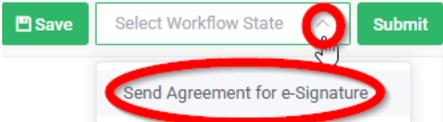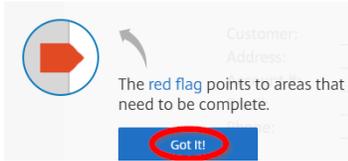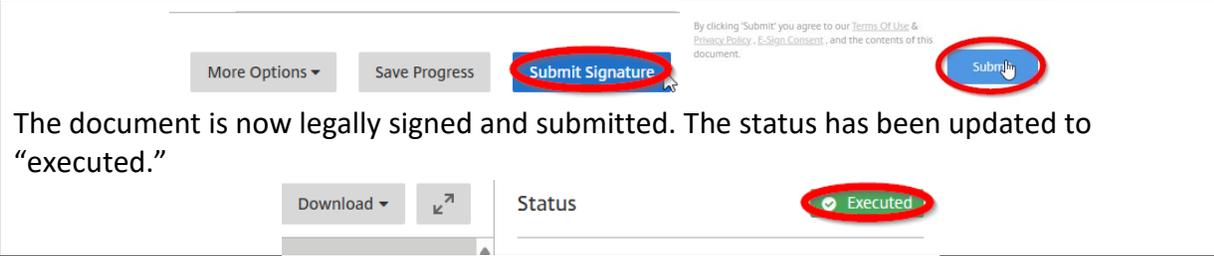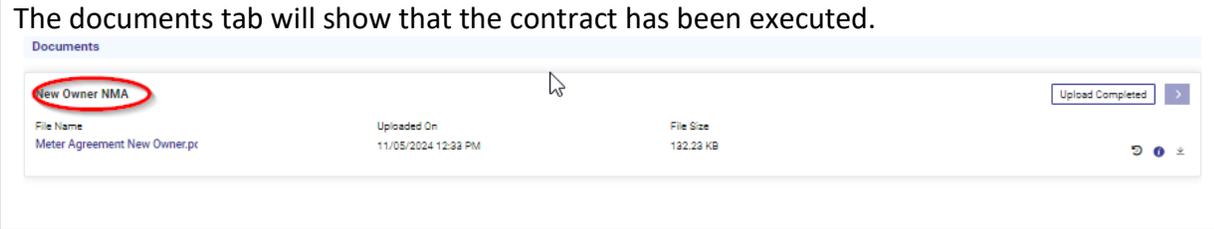|		
2.	Starting a net metering agreement.	Once logged in, you will see three options on the dashboard. From left to right, the boxes are: 1. View an application created by an installer to install a new solar energy system on your home. Create an application to install your own solar system. This feature is coming soon. 2. View or start a rollover opt-in view or start 3. View or start a net metering agreement form. To create a new owner or tenant transfer net metering agreement, select the last option. **What would you like to do?** **View My Connecting Solar Application(s)** *Feature Coming Soon* View Start **Submit a Rollover Opt-in Form** Opt-in to rollover the energy credits from your solar panels. View Start **Submit a Net Metering Agreement Form** Create and view your Net Metering Agreement form for transfers. View Start
3.	Completing the form.	Fields marked with an asterisk (*) are required fields. Please complete all the customer information sections unless you are transferring ownership for a business account. Once the form is complete click "Save." Tenant New Owner ⎯ ×Close 🖫 Save Application ID: Workflow Status: Created At: Updated At: **Customer Information** Account Number * Customer Type (Select) * Account Type (Select) * Last Name/Business Name First Name Middle Name * Email * Phone Number **Service Address** * Street Number * Street Name * City * State (CO) * Zip Code **Mailing Address** Same as Customer (No) * Address * City * State * Zip Code
4.	Error	The data must match the billing account. If an error occurs while saving, check the information entered. The error will clear once each section is completed and consistent with your utility billing account. Verify by checking your bill or calling customer service at 719.448.4800.

		Errors ✕ • The account information entered cannot be verified. Please confirm that the information entered matches the utility bill. If you continue to experience problems, please contact us at connectingsolar@csu.org or 719-448-4800
5.	Save your work.	Click "Save" in the top right-hand corner to come back later or proceed. ✕ Close 💾 Save
6.	Successfully saved.	The system will "think" and show a spinning circle in the middle of the screen. Then, a popup at the top center of the screen will appear "record saved successfully." ✓ Record saved successfully
7.	Submit for processing.	Click "Submit" in the top right corner to generate the form. The box to the left of "submit" will self-populate with "Generate Net Meter Agreement." CONNECTING SOLAR Colorado Springs Utilities Dashboard Training Guides Tenant New Owner ✎ 🔒 💬 Comments ✕ Close 💾 Save Generate Net Meter Agreemer ⌄ Submit Application ID: TRF-24 Workflow Status: Created Created At: 11/05/2024 Updated At: 11/05/2024 Customer Information
8.	Comments optional	A popup will appear, allowing you to add an optional comment. This comment will save to the form and be visible to internal staff. After entering a comment or leaving it blank click "Save." Add Workflow Comment ✕ Comment ✕ Cancel 💾 Save While the form is generating the system will show three green dots at the top next to "comments." ●●•
9.	Agreement for e-signature	To send the form to your email for the e-signature click the down arrow and select "send agreement for e-signature." Then click submit.
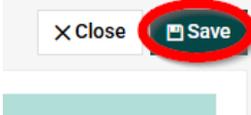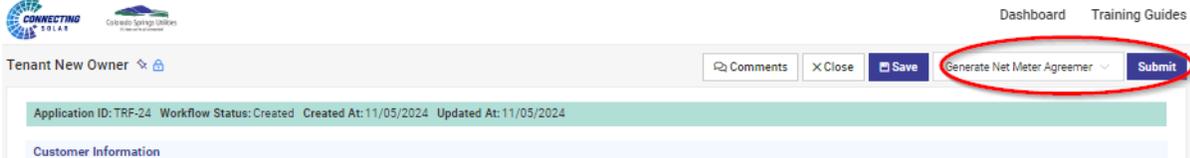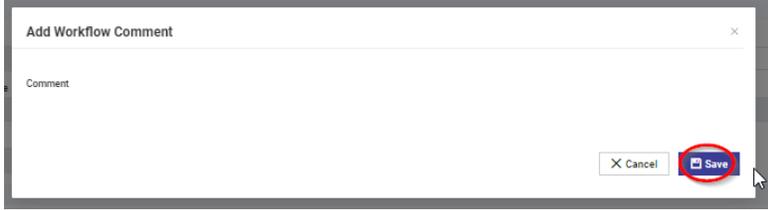
While the document generates for signature the three green dots will appear again.

An email from Right Signature, a company that provides secure electronic signature solutions will send an email to the email entered on the document. After you sign, Right Signature will send the completed agreement to your email and the system administrators.

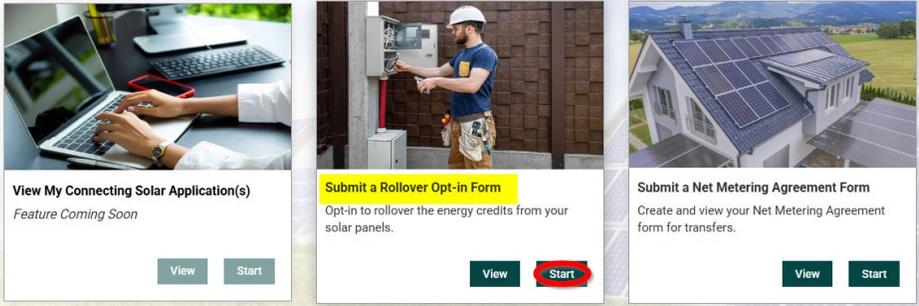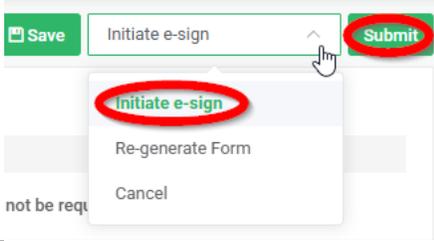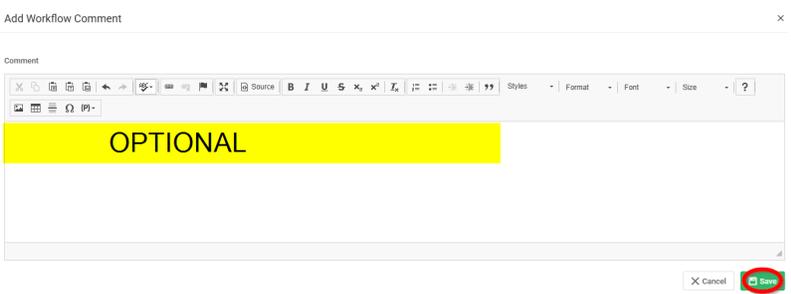|	
10. Review the agreement contract.	Check your inbox and spam folders for an email from "RightSignature." The email will have your email address and the agreement requiring attention. Open the document by clicking on "review & sign document." Review the document thoroughly as this is a legally binding agreement to connect your solar and home to the electric grid.
11. E-signing agreement contract	Sign the form by following the red flags. Click "got it" twice as the tutorial walks you through the document. Click on the down pointing red flag to go directly to the signature page. E-sign by clicking on the box. Use the mouse to "sign." Then, date by clicking on the date box and selecting today's date. Click "submit signature" in the bottom right to save the completed form. Then click "submit" to agree to the terms of the agreement.

The document is now legally signed and submitted. The status has been updated to "executed."

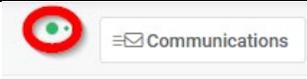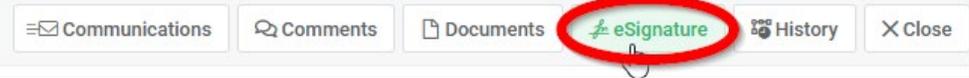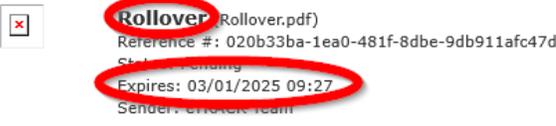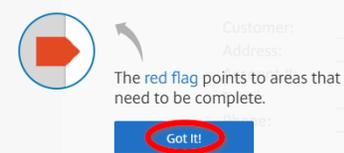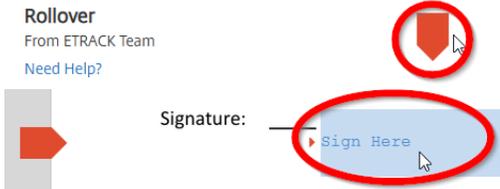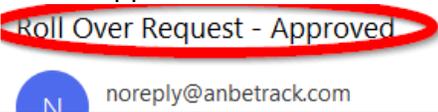| 12. Net metering agreement (NMA) document complete.	The documents tab will show that the contract has been executed.
13. Account updates.	Once your billing account has been updated you will receive an email with a bill explainer, optional rollover request, and the executed net metering agreement. Retain this form for your legal records.

Ready to stop cashing out annually?

Use this process for optional rollover by clicking on the "Submit a Rollover Opt-in Form."
The rollover option allows you to carry excess solar generation from the end of December into the new year. You can choose this option at any time in the future, but once selected, it cannot be reversed.

Step	Action
1. Open the dashboard.	To access the dashboard, navigate to the customer log in page and sign in.

2. Starting a Rollover.	Once logged in, you will see three options on the dashboard. From left to right, the boxes are:
	  1. View an application created by an installer to install a new solar energy system on your home. Create an application to install your own solar system. This feature is coming soon.
	  2. View or start a rollover opt-in view or start
	  3. View or start a net metering agreement form.
	To create a new optional rollover request, click "start" in the middle box.

What would you like to do?

View My Connecting Solar Application(s)
Feature Coming Soon
View   Start

Submit a Rollover Opt-in Form
Opt-in to rollover the energy credits from your solar panels.
View   Start

Submit a Net Metering Agreement Form
Create and view your Net Metering Agreement form for transfers.
View   Start

3. Complete the form	Fields marked with an asterisk (*) are required fields. Please complete all the customer information sections unless you are requesting a rollover for a business in that case only enter your company name into the business name field. Click "Save" in the top right corner.
4. Submit	"Submit" the document to generate the rollover document. An optional comment box will appear. Click "save" to continue with the generation of the document.
5. E-signature	Start the signature process. Click the down arrow and select "Initiate e-sign." Then, click "submit."
6. Optional Comment	A popup will appear for an optional comment. Enter a comment or leave blank and click "save" to proceed to the e-signature form generation. Three dots will appear in the top ribbon to indicate the form generation.

7.	eSignature	The new button in the top ribbon "eSignature" is now active. This button provides information on the communication sent and progress.
8.	Review the agreement contract.	Check your email for an email from "RightSignature." The email will have the rollover agreement requiring your attention. The link expires, please sign the document within 24 hours from the generation. Open the document by clicking on "review & sign document." Review the document thoroughly as this is a legally binding agreement to connect your solar and home to the electric grid.
9.	E-signing agreement contract	Sign the form by following the red flags. Click "got it" twice as the tutorial walks you through the document. Click on the down pointing red flag at the bottom of the page to go directly to the signature section. E-sign by clicking on the "Sign Here" box. Use the mouse to "sign." Then, date by clicking on the date box and selecting the today's date. Click "submit signature" in the bottom right to save the completed form. Then click "submit" to agree to the terms of the agreement.

	The document is now legally signed and submitted. The status has been updated to "executed." An email will be sent with the executed document. You may close this window.
10. Document complete.	The documents tab will show the rollover created rollover and signed rollover contracts.
11. Account updates.	Once your billing account has been updated you will receive an email with the statement your rollover request has been approved.