



Navigating PowerClerk Applicant Training Guide

August 2026



©2020 Clean Power Research, L.L.C. The information contained in this presentation is confidential.

Table of Contents

PowerClerk Overview

PowerClerk as an application portal for
NorthWestern Energy Small Generator
Interconnection Requests

Rollout schedule

Account Registration

How to register and verify a new account, or
add programs to an existing account

Application Process

How to submit new applications using
PowerClerk

PowerClerk Home / Project Page

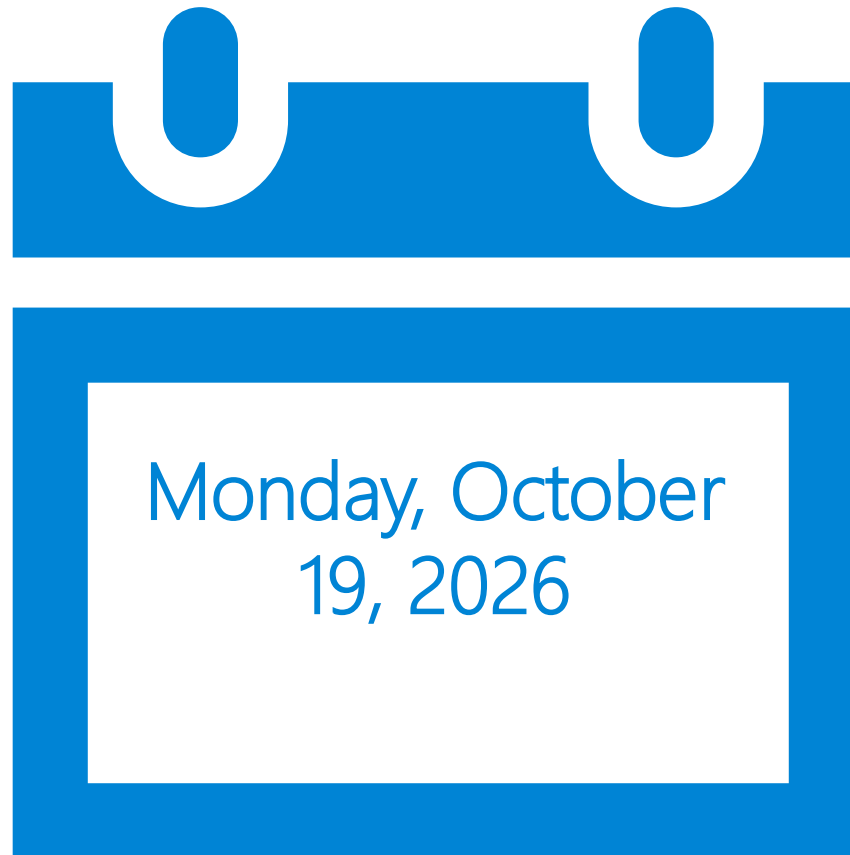
Navigating between multiple projects

Available Forms

Additional forms available through the
application process

Requiring Support

How to ask a question when using
PowerClerk



PowerClerk Overview



PowerClerk is the online application portal for **NorthWestern Energy's Small Generator Interconnection**

Requests and will be used to:

- Create and submit new Level 1 Small Generator Facility Interconnection Requests
- Monitor the progress of Level 1 Small Generator Facility Interconnection Requests
- Send and receive notifications about project/application status and updates
- Submit all **Small Generator Requests** related information

Key Terms Defined

These are some terms you will see throughout this training guide

Program

PowerClerk is grouped by "Programs" which separate different application types.

Form

The application process is broken out into different sections called forms.

Project Owner

The project owner is the person associated with the account that is submitting the application.

Workflow

The workflow is the technology used to progress a project through the application process.

Log In Page

The log in page is the page you land on before log in into a PowerClerk program.

Home Page

The home page is the page that you land on after logging into a PowerClerk program. All of the projects you own and/or have access to will show up on this page.

Project Page

The project page is the project-specific page that is shown after a project is selected and is used to view progress and fulfill actions of a specific project.

Account Registration

How to Create a New PowerClerk Account / Register an Existing Account

New to PowerClerk?

Step One

- Navigate to the PowerClerk link posted directly on your Utility's website

Step Two

- Click 'Register' a New Account, enter your email address, create a password in accordance with the requirements, and complete the rest of the required fields

Step Three

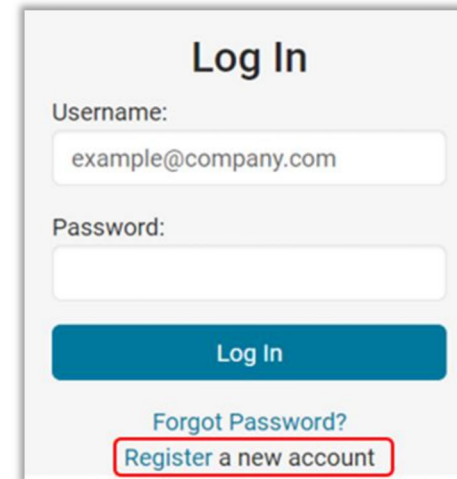
- Under Role, select '**Applicant**' to submit applications

Step Four

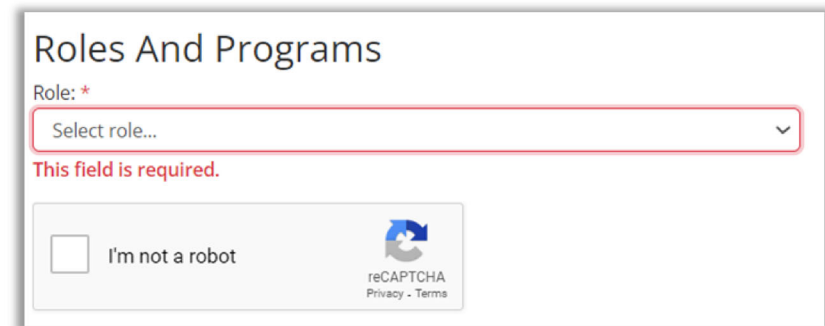
- Click the reCAPTCHA button to verify you are not a robot

Step Five

- Click the one-time use link in the email sent to the previously entered email address to complete registration.



A login form titled "Log In". It contains two input fields: "Username:" with the placeholder text "example@company.com" and "Password:". Below the password field is a blue "Log In" button. At the bottom, there are two links: "Forgot Password?" and "Register a new account", which is highlighted with a red rectangular border.



A form titled "Roles And Programs". It features a "Role: *" dropdown menu with the text "Select role..." and a downward arrow. Below the dropdown, a red error message states "This field is required." At the bottom, there is a checkbox labeled "I'm not a robot" and a reCAPTCHA logo with links for "Privacy" and "Terms".

Already have a PowerClerk Account?

Step One

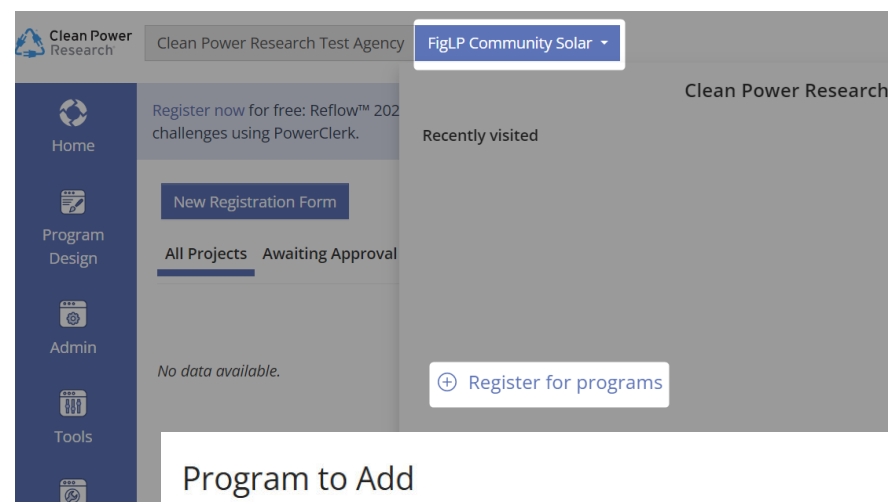
- Log Into your PowerClerk account. Any PowerClerk account will do.

Step Two

- Select the current program at the top left then select "Register For Programs".

Step Three

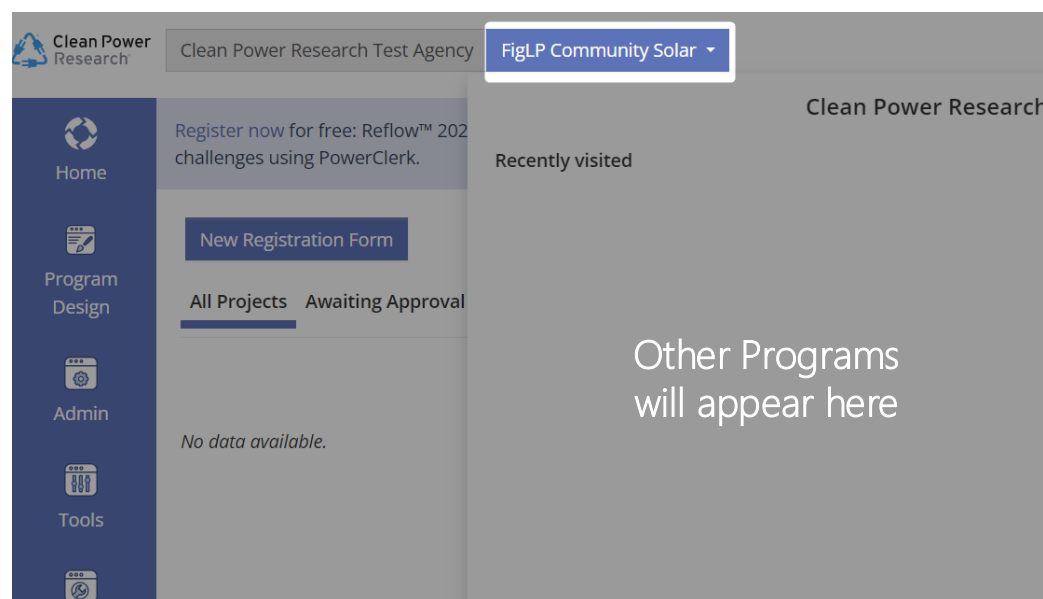
- Under "Program to Add" select NorthWestern Energy Small Generator Interconnection Requests



The screenshot shows the PowerClerk interface. At the top, there's a header with 'Clean Power Research' and a dropdown menu currently set to 'FigLP Community Solar'. Below the header, there's a sidebar with navigation links: Home, Program Design, Admin, and Tools. The main content area has a 'New Registration Form' button and a 'Register for programs' button. A 'Program to Add' section is highlighted with a blue border, containing dropdown menus for 'Agency' (set to 'NorthWestern Energy') and 'Program' (set to 'Small Generator Interconnection Requests'). Below these are fields for 'Role' and 'Please select a role...'. The interface also shows a 'Recently visited' section and a 'No data available' message.

Navigating PowerClerk Programs

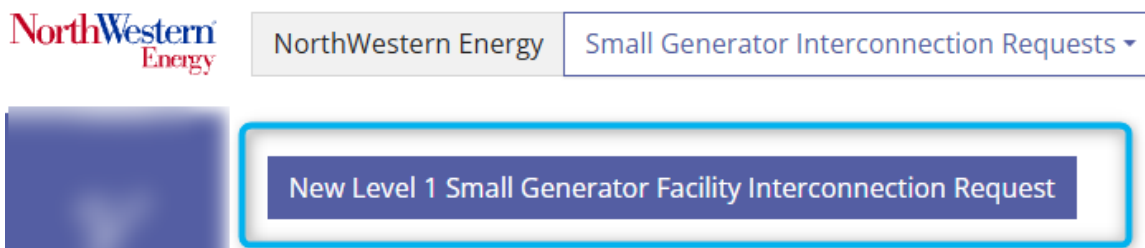
Select the current program dropdown at the top left of the screen to switch between all programs added to your account.



Application Process

New Applications

Upon logging into PowerClerk you will see a button at the top left of your screen to begin your application.



Application Navigation

After opening the application, the **Application Page Numbers** will appear at the top of the form.

To quickly move to a specific part of the form, select one of these numbered page boxes.

To navigate from page to page, select the **"Back"** or **"Next"** buttons at the bottom of the page.

Level 1 Small Generator Facility Interconnection Request
Up to 50 kilowatts ("kW")

1	2	3	4	5	>
Information & Instructions	Applicant Information	Small Generating Facility Information	Documentation	Exhibit A	

Back	←	→	Next
------	---	---	------

Application Submission

To **submit** the application, click the “**Proceed to Payment**” button at the bottom of the 6th page.

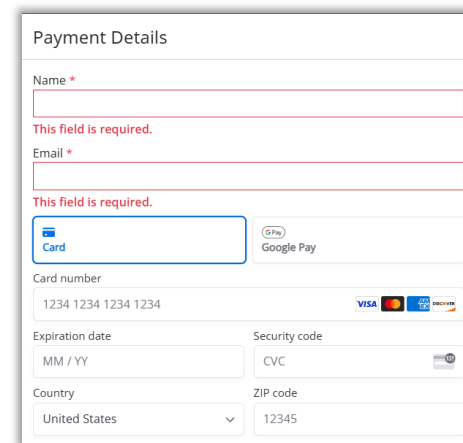
If the person applying is the NWE Customer, payment will be required **before** the application will be accepted.

If the person applying is doing so on behalf of the NWE Customer, you see the message, “Payment is not required. Press the Submit button to continue.” After the application has been submitted, the Customer will be notified and asked to provide authorization before payment will be required.

If any **required information** has not been entered, a **red** section will appear at the bottom of the page when you select “Submit”.

Click the **blue page link** to navigate to the portion of the application you need to fill out and re-submit.

Example of Credit Card Payment. ACH is also available



Payment Details

Name *

This field is required.

Email *

This field is required.

☒ Card ☐ Google Pay

Card number
1234 1234 1234 1234

Expiration date
MM / YY

Security code
CVC

Country
United States

ZIP code
12345

ePayment

Payment is not required. Press the Submit button to continue.

Unable to Submit Form

Please fix the errors below and try again.

Missing Required Fields:

- "PV System Specification" must be completed and calculated [Page 2](#)

PowerClerk Home / Project Page

Navigating Through Projects

PowerClerk Home Screen

Your PowerClerk Home Page will show **every** project that you have started a request for or have submitted.

To view an individual project landing page, **select** the project followed by **“View”/Edit Project**.

Queue ID	Current Status	Current Status Timestamp	Premise Address
▼ L1NM-00005			
View/Edit Project Admin			
No related projects			

PowerClerk Project Landing Page

The PowerClerk project landing page houses all the information, attachments, communications, and additional forms for your project.

Milestones: Blue highlighted chevrons below your project number indicate what milestone your project is currently in.

Select the carrot (>) next to each menu to **expand** the section and reveal important information.

The screenshot shows the 'View/Edit: Unsubmitted Project' interface. At the top, there's a navigation bar with a 'Go To Admin' button and a 'Go to NET-' dropdown. Below this is a horizontal sequence of chevrons representing project milestones: 'Customer Action Required' (highlighted in blue), 'Application Review', 'IA Signatures Pending', 'Installation', 'Inspection', 'Net Meter Requested', 'Permission to Operate', 'Holding Status', and 'Withdrawn'. The main content area is divided into three expandable sections: 'Current Status', 'Project Summary', and 'Current Forms'. The 'Current Status' section shows the project was marked as 'Unsubmitted' on 3/6/2026 at 1:49 PM, with a description 'This application has not yet been submitted.' and creation/last update timestamps. The 'Project Summary' section contains a table with fields for Customer Name, Installer Name, Who Submitted the Application, Premise Address, Account Number, Existing Meter Number, Residential or Commercial, Application Received, Total Nameplate AC Capacity (kW), Division, Energy Source, Est. Installation Date, Est. In-Service Date, and Final Inspection Date, all currently set to 'None'. The 'Current Forms' section shows a table with one form: 'Level 1 Small Generator Facility Interconnection Request', which is currently 'In Progress'.

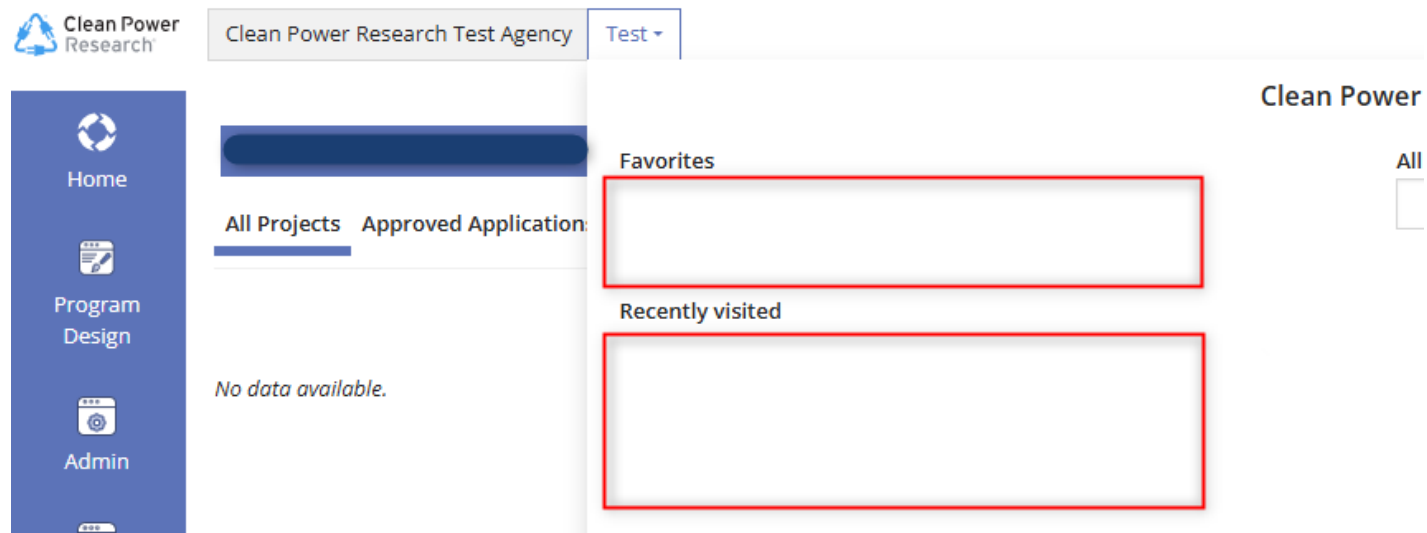
View/Edit: Unsubmitted Project			
Go To Admin			
Go to NET- Go			
Customer Action Required Application Review IA Signatures Pending Installation Inspection Net Meter Requested Permission to Operate Holding Status Withdrawn			
Current Status			
Status marked as Unsubmitted on 3/6/2026 at 1:49 PM			
Status Description: This application has not yet been submitted.			
Project Owner:			
Created on 3/6/2026 at 1:49 PM (10 minutes ago)			
Last Updated on 3/6/2026 at 1:49 PM (10 minutes ago)			
Project Summary			
Customer Name Company	Installer Name Company	Who Submitted the Application?	Premise Address
None	None	None	None
Account Number	Existing Meter Number	Residential or Commercial	
None	None	None	
Application Received	Total Nameplate AC Capacity (kW)	Division	Energy Source
None	None	None	None
Est. Installation Date	Est. In-Service Date	Final Inspection Date	
None	None	None	
Current Forms			
Form Name	Form Status		
Level 1 Small Generator Facility Interconnection Request	Continue	View	In Progress

Navigating PowerClerk Programs

For anyone registered in more than one program, it is important to verify that you are in the desired program prior to taking any action.

To do this, you will want to verify the program name displayed at the top left.

To switch between programs on your account, click on the dropdown arrow just to the right of the program name.



Available Forms

Additional Project Forms In PowerClerk

How to find and fill out available project forms

Depending on the status of your application certain forms will become available for the applicant to fill out and submit.

Forms **must be completed** and submitted to move your project along its workflow. Select “Begin” next to your form to complete and submit.

▼ Current Forms

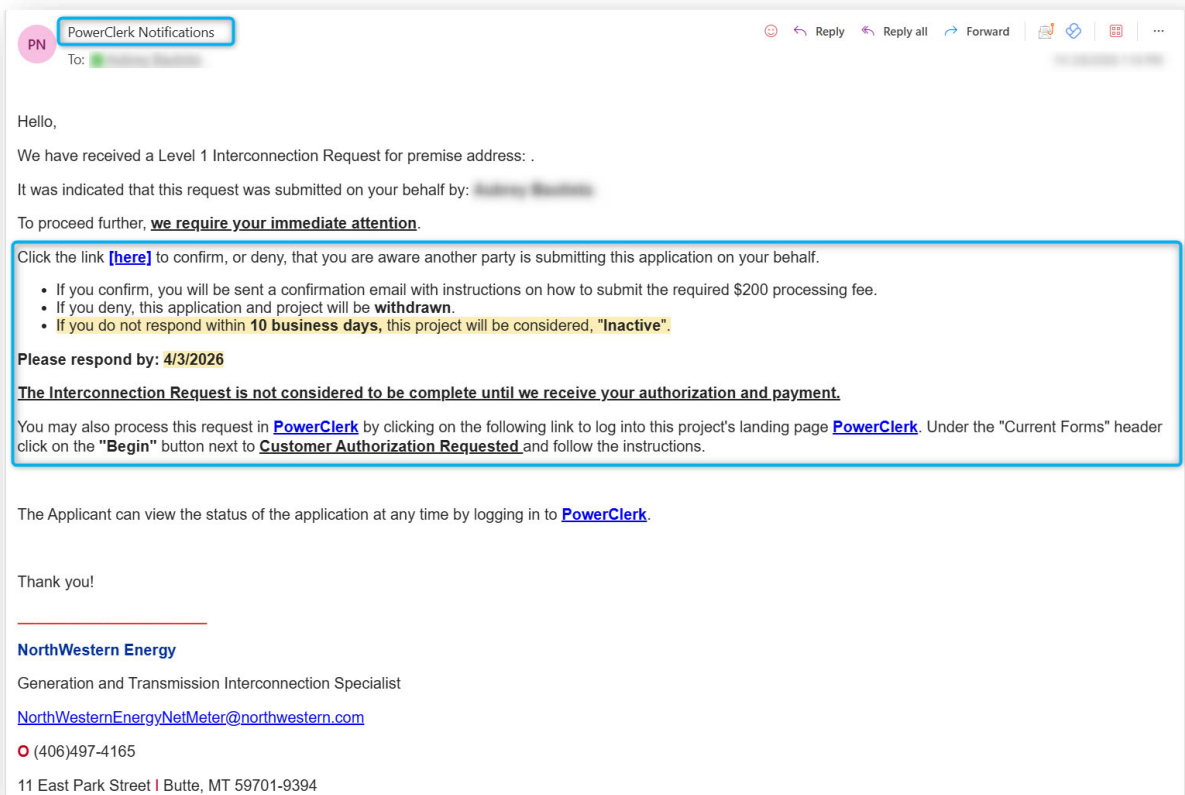
Form Name		▲▼ Form Status
Customer Authorization Requested	Begin	New Form Became available on
Withdraw Request	Begin	New Form Became available on

PowerClerk Notification Emails

From time to time you will receive emails from PowerClerk with action items.

Inside these emails will be a **description of the action required** (if any) and a **link** to direct you to PowerClerk.

Please monitor your email inbox for communications sent from DoNotReply@PowerClerk.com



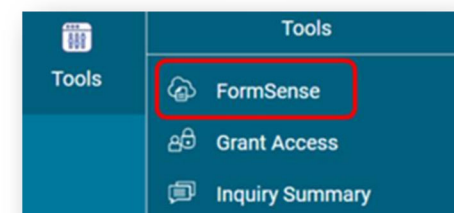
Tips & Tricks – Using FormSense

FormSense allows Applicants who plan to submit multiple applications in a program – such as an installer – to save default values for optional use in new applications.

Follow these steps:

1. Click the “Tools” menu on the left side of your screen, then select “FormSense”
2. Select the Form you would like to set default values for and select “Edit My Defaults”
3. Enter your default values and select “Save FormSense Defaults”

Note that you cannot pre-define values for fields or attachments that are marked as Read Only in the FormSense form.

A screenshot of the 'FormSense' application interface. The top section is titled 'FormSense' and contains a description: 'FormSense helps you save time on forms you fill out frequently. Your FormSense defaults are default form values specific to your PowerClerk account. They will not affect other users filling out the same form. Modifying your FormSense defaults will only affect new forms and will not affect forms you have already started.' Below this is a dropdown menu labeled 'Select a form to edit its FormSense defaults:'. A red box highlights the 'Edit My Defaults' button. The bottom section is titled 'Edit FormSense Defaults' and 'Begin Interconnection Request Process'. It shows a progress bar with two steps: '1 Program Verification - Requirements' (active) and '2 Next Steps'. Below the progress bar is a section titled 'Program Verification Questions' with the instruction 'Please answer the following questions to verify you are applying for the appropriate program:'. There is a dropdown menu for 'System Intended Design' with 'Energy offset' selected. At the bottom, there is a text field for 'What are your application objectives?' and two buttons: 'Cancel' and 'Save FormSense Defaults'.

Granting Access to Projects

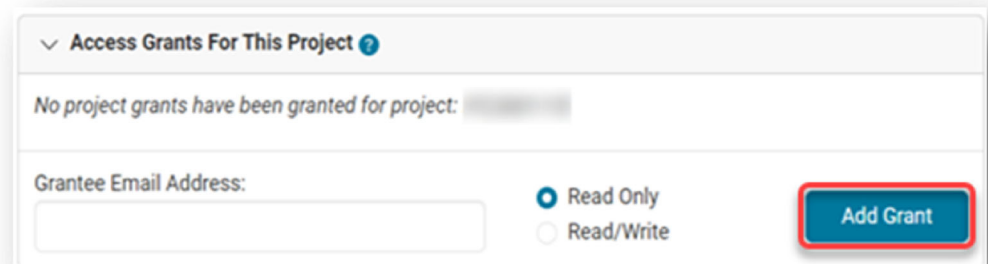
How to Grant Teammates Access to your PowerClerk Projects

Granting Individual Project Access

A project grant gives a user access to a particular project in PowerClerk.

- You can provide individual project access to a teammate from the **View/Edit** screen of your project.
- Scroll down to the **"Access Grants for this Project"** menu.
- Enter your teammates email address
 - Note: Your teammate will need to **register** for their own individual PowerClerk account first.
- Choose whether this teammate can view project information only (**Read Only**) or if you want them to have the ability to fill out forms (**Read/Write**)
- Select **"Add Grant"**

Please note: access can be modified or revoked at any time by the Project Owner

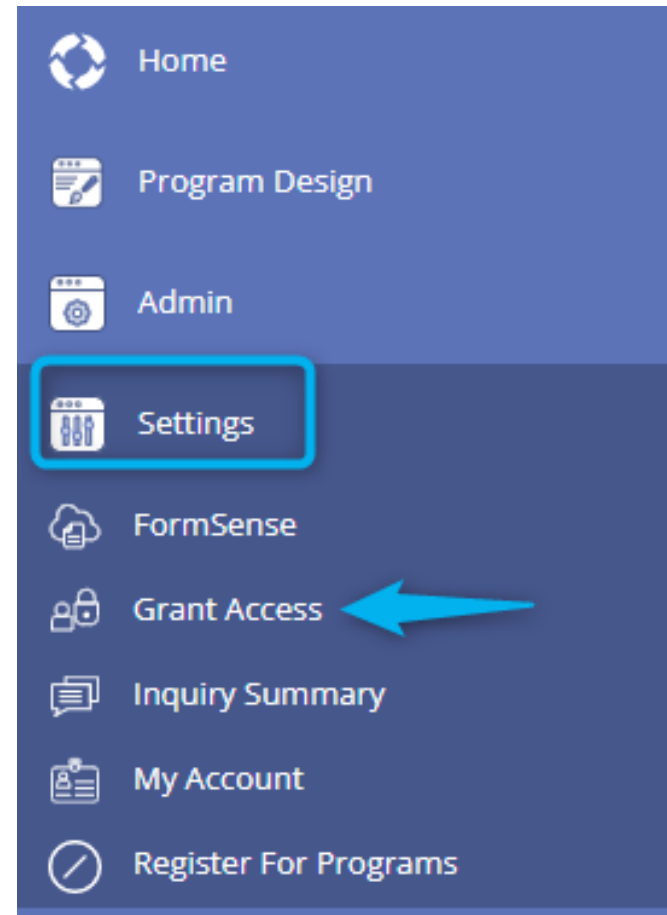


The screenshot shows a web interface for managing project access. At the top, there is a section titled "Access Grants For This Project" with a downward arrow and a help icon. Below this, a message states "No project grants have been granted for project:" followed by a blurred project name. Underneath, there is a label "Grantee Email Address:" next to an empty text input field. To the right of the input field are two radio button options: "Read Only" (which is selected) and "Read/Write". A blue button with a red border labeled "Add Grant" is positioned to the right of the radio buttons.

Granting Broad Project Access

Need one of your teammates to have access to **ALL** of your PowerClerk Projects?

- You can provide broad access to a teammate from the **Settings Menu** of PowerClerk.
- **Granting Broad Access** means that your teammate will have access to **EVERY** one of your PowerClerk projects as if they were there own.
- Select **"Grant Access"** and enter in your teammates email address.
 - Note: Your teammate will need to **register** for their own individual PowerClerk account first.
- Granting Broad Access will allow the grantee **Read/Write** privileges.



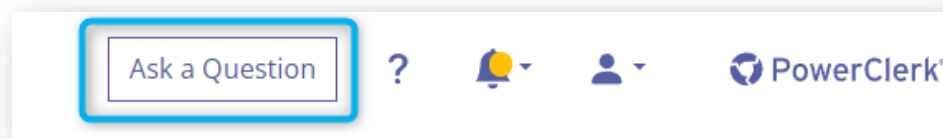
Need Help? "Ask A Question"

How to submit questions to NorthWestern Energy

How to Submit a Question to NorthWestern Energy

Select the **"Ask Us a Question"** button located on the top right of the PowerClerk screen to fill out and submit a project related question to **NorthWestern Energy**

Once **NorthWestern Energy** has responded to your question you will receive an email from PowerClerk directing you to navigate to the View/Edit page of your project.



Ask a Question

Which project do you have a question about? *

NET-00003

Which of these categories best describes your question? *

Payment

Enter a title for your question: *

Need Help

Please describe your question in detail: *

Hi,

I am having am receiving an error when trying to submit my payment, please help.

Thank you

Remaining Characters: 3901

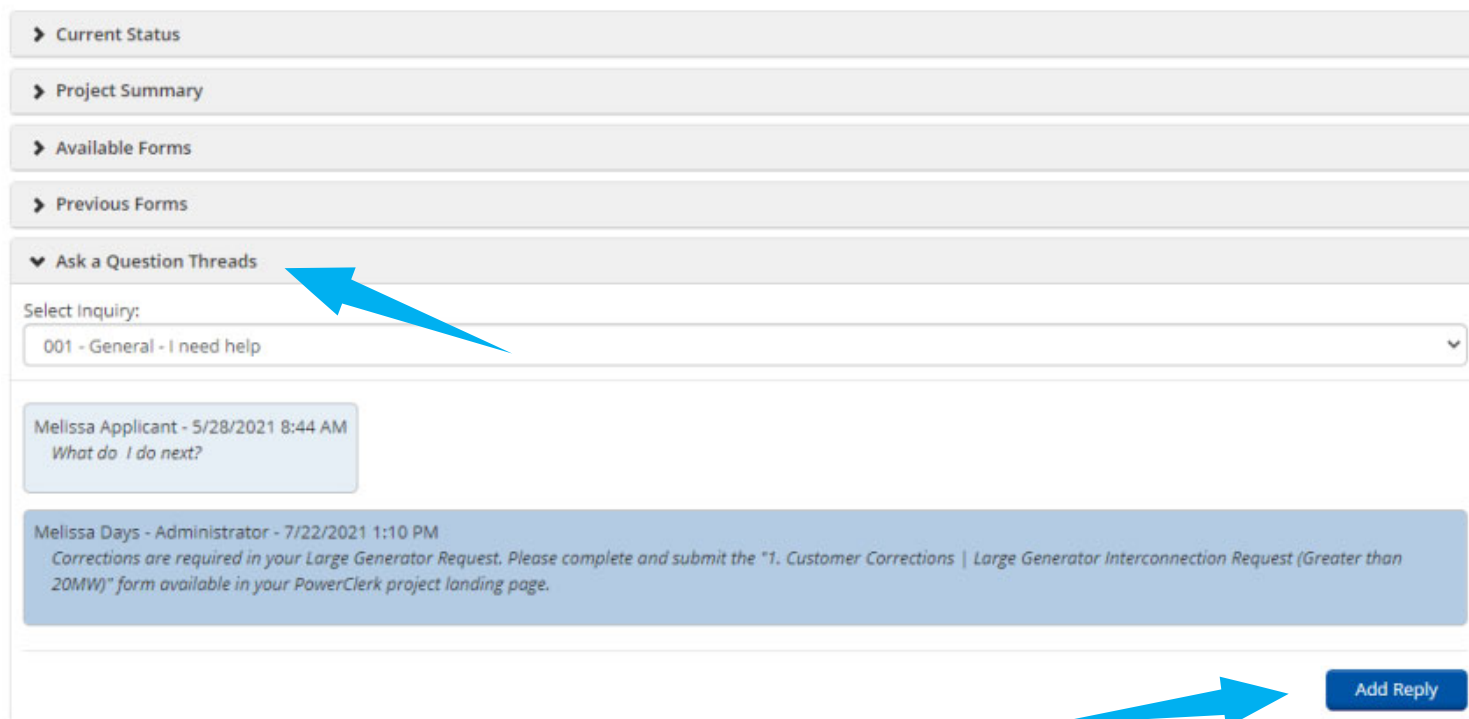
Cancel

Submit Question

How to View NorthWestern Energy Responses

You will be able to review **NorthWestern Energy** response under the "Ask a Questions" thread within your **Projects 'View/Edit'** page.

You may respond to **NorthWestern Energy** directly from PowerClerk by selecting **"Add Reply"**.



Current Status

Project Summary

Available Forms

Previous Forms

▼ Ask a Question Threads

Select Inquiry:

001 - General - I need help

Melissa Applicant - 5/28/2021 8:44 AM
What do I do next?

Melissa Days - Administrator - 7/22/2021 1:10 PM
Corrections are required in your Large Generator Request. Please complete and submit the "1. Customer Corrections | Large Generator Interconnection Request (Greater than 20MW)" form available in your PowerClerk project landing page.

Add Reply

Change the Project Owner

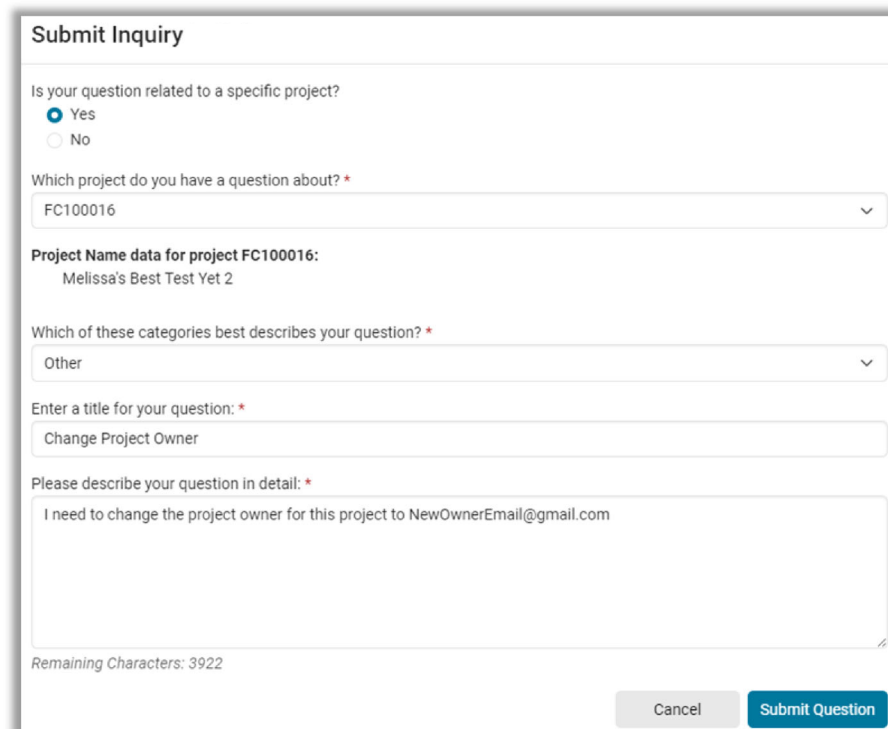
The project owner is the person associated with the account that is submitting the application.

To change the project owner for a specific project, follow these steps:

1. Click the "Submit Inquiry to Duke" button, located at the top right of the home page
2. Select "Yes" to the first question and select the project you would like to change the owner.
3. Select the "Other" category
4. Enter "Change Project Owner" for the title
5. In the description section please include the new contact's email address.

Note: New project owner must have a PowerClerk account and they must be registered for the aligned program

New owner will have the ability to manage grantees.



The screenshot shows a web form titled "Submit Inquiry". It contains the following fields and options:

- Question: "Is your question related to a specific project?" with radio buttons for "Yes" (selected) and "No".
- Dropdown: "Which project do you have a question about? *" with the value "FC100016".
- Text: "Project Name data for project FC100016: Melissa's Best Test Yet 2".
- Dropdown: "Which of these categories best describes your question? *" with the value "Other".
- Text: "Enter a title for your question: *" with the value "Change Project Owner".
- Text area: "Please describe your question in detail: *" with the text "I need to change the project owner for this project to NewOwnerEmail@gmail.com".
- Footer: "Remaining Characters: 3922".
- Buttons: "Cancel" and "Submit Question".