PowerClerk – Registration & Commercial Applications
New Service Delivery

PRESENTED BY:

Manuel Quintana – Senior Account Manager

Ryan Saiz-Buchanan – Technical Program Manager
PNM PROUDLY SERVING NEW MEXICANS FOR OVER 100 YEARS

• 530,000 customers in 40 communities across New Mexico

• 15,158 miles of transmission and distribution lines

• 2,701 MW generation capacity
AGENDA

- New Service Delivery Application Processing Update
- Clean Power Research – Historical Background
- What is PowerClerk?
- PowerClerk Benefits
- PowerClerk – 1st time User Registration Process
- PowerClerk – Adding Additional Programs
- Commercial Application Completion
- Project Status/Information
- Questions
PNM has reorganized its Metro New Service Delivery application process into 3 departments that are specialized to more efficiently process applications:

- The Northern and Southern Divisions will adopt similar model in near future

<table>
<thead>
<tr>
<th>Customer Interconnection</th>
<th>Design Engineering</th>
<th>Work Management</th>
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<tbody>
<tr>
<td>Responsibilities include:</td>
<td>Responsibilities include:</td>
<td>Responsibilities include:</td>
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<tr>
<td>• Application Review</td>
<td>• Project Design</td>
<td>• Generation of Agreements/Contracts</td>
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<tr>
<td>• Document Collection and Review</td>
<td>• Triggering Supplemental Department Reviews</td>
<td>• Collection of fees</td>
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<tr>
<td>• Site Assessments</td>
<td>• Peer Review</td>
<td>• Scheduling Excavation/Line Work</td>
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<td>• Load Calculations</td>
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<td>• Inspections</td>
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<td>• Application Approval:</td>
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<td>• Permit Review</td>
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<td>• To Design Eng for Line Extensions</td>
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<td>• Scheduling Energization</td>
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<td>• To Work Mgmt for Energization</td>
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WHAT IS Clean Power Research®?

HISTORICAL BACKGROUND

• Clean Power Research (CPR) was originally founded in 1997 by Thomas Hoff, Ph.D. as a consultancy focused on the economics of renewable energy
• In 2000, “PowerClerk” launched to alleviate the challenges of paper-based incentive application processes
• In 2014, “PowerClerk Interconnect” Launches to reduce soft solar costs by bringing a paper-intensive process online
• In 2020, “evAPP” launches to help utilities manage EV Programs
• Clean Power Research Software serves 10 of the top 10 Fortune 500 utilities and many of the world’s largest renewable energy companies.

OUR VALUES

Honesty
We strive for honesty and integrity in everything we do

Objectivity
We approach problems and evaluate solutions with objectivity

Excellence
We demand excellence and are always striving for improvement

Ingenuity
We value team members’ ingenuity and commitment to innovation
WHAT IS PowerClerk®?

OVERVIEW

• Cloud and Browser based Service
• Optimized for Computer, Tablet, and Mobile use
• 1M+ applications processed
• 100+ Programs at 40+ Utilities
• Secure, SOC2 Comp

Adaptable: PowerClerk is built to adapt quickly to changing business and regulatory requirements via a cloud-hosted, browser-based, no-code workflow automation software platform.

Trusted: PowerClerk is trusted by more than 40 utilities and agencies to manage their DER programs, including many of the largest programs in the country.

Efficient: PowerClerk provides transparency for applicants while keeping program managers, planners, executives and regulatory agencies informed through system integrations, dashboards and reporting.
BENEFITS

• Visualize Workflows
  – Easy configuration, multiple flow in a single program, test changes before going live

• Automate Communications
  – Keep applicants informed of project status with auto-generated emails

• Configure Custom Forms
  – Develop multiple forms per program, conditional visibility reduces errors & save time

• Eliminate Paper
  – Generate agreements based on application-specific information for secure eSignatures
1ST TIME USER REGISTRATION

- PNM PowerClerk New Service Delivery Website:
  - [https://pnmnsd.powerclerk.com/MvcAccount/Login](https://pnmnsd.powerclerk.com/MvcAccount/Login)

**PNM New Service Delivery Program**

Update June 1st: Subdivision Applications are now being accepted in the PowerClerk New Service Delivery Program!

To submit Residential New and Upgrade Commercial New and Upgrade applications, or Subdivision applications please log in using your email address and password to the right.

If you are a first time user, please select “Register” a new account below the log in button and complete the registration form. Upon submitting the form, you will receive an activation email. Once your account is active, you will be able to log in and submit Residential and/or Commercial New and Upgrade applications.

For a tutorial on how to complete an application, please watch the video “PNM Residential Application Tutorial”.

Log In
- Username: example@company.com
- Password: [Enter Password]
- Log In
- [Forgot Password? Register a new account]
1ST TIME USER REGISTRATION

- Complete User Information
  - * Denotes required fields
- Select Role: Applicant
- Select Program(s)
- Click reCAPTCHA
- Click Register
1ST TIME USER REGISTRATION

• Registration email

Account Confirmation

Dear Ryan,

Thank you for creating a PowerClerk account!

Please click the link below or copy it to your browser to complete registration.

https://pnmrsid.powerclerk.com/MycAccount/ConfirmAccount?id=WUMR5FVIAW1HI6&key=7_LqlG71Gx5&g=MmAcNkXkm1_DxPmPqBxWcW5Vf_y6BAgC7Ma2gWxbOJFleBk&ProgramId=62AAWGX3X87

If you did not initiate this registration or believe this message has been sent in error, do not click the link. The account cannot be accessed without an email verification.

If you have any questions, please contact your Program Administrator.

Thank you,

The PowerClerk Team

Account Registration Successful

Confirmation successful! Please log in to access your PowerClerk account.
EXISTING USERS: ADDING ADDITIONAL PROGRAMS

Click Settings ➔ Add Programs
EXISTING USERS: ADDING ADDITIONAL PROGRAMS

- Select “Public Service Company of New Mexico” in the Agency Dropdown
- Click Add Program
EXISTING USERS: ADDING ADDITIONAL PROGRAMS

- To change between Programs, Select “Change Program” and select applicable program in dropdown.
PNM – POWERCLERK COMMERCIAL APPLICATION

From Home Page, Click “New Commercial Application (New and Upgrade)
* Denotes required fields

The benefits of submitting your application online include:

- Faster processing of your request.
- Online 24/7 tracking of your open requests.
- Status updates via email as your project moves through the new construction or upgrade process.
- One portal for tracking comments from your PNM representative regarding your request.

Keep in mind these tips as you fill out your application:

- You can navigate between pages of the application by clicking the numbered boxes at the top of the page.
- PowerClerk automatically saves your progress.
- You can log out and when you return, you’ll pick up where you left off.
- Please DON’T USE ALL CAPS.

Next to some data fields in the application, you will find blue circles with white question marks in the middle. Clicking these circles will provide additional information to help inform you as to what to put in the respective data field.

If you need help at any point when completing this application, you can reach Concierge Services by calling 505-241-3425 as soon as possible.

Click the ‘Submit’ button at the end of the application to submit.

Please check the box below to acknowledge that you have read the above information.

[ ] I have read and acknowledged the information above.

Now, let's get started on your application...
What city is closest to your service address? *
Select...

Do you have a PNM Account Number for the new construction site? *
- Yes
- No

Click here for an example of where to find the Account Number on your bill.

Does the property have a PNM electric meter? *
- Yes
- No

Is temporary billing different than above listed Billing Contact?
- Yes
- No

Would you like to list additional contacts? If so, how many?
Select...

Back  Next
COMMERCIAL APPLICATION - PROJECT DETAILS

Commercial Application (New and Upgrade)

1. Welcome
2. Customer Information
3. Project Details
4. Attachments

For safety awareness and planning for clearances from energized lines, is the proposed building less than 20 ft from an overhead power line?
- Yes
- No
- I don’t know

What is your estimated temporary In-Service Date?

What is your estimated permanent In-Service Date?

Project or Business Name (e.g. Tacos Bell, Barnes and Noble, etc.)*

Business Type*:
Select...

Please give a brief description of the scope of your project:

What is the current stage of construction?*
- Design
- Stacked
- Construction
- Completed

Electric Service Voltage Requested*:
- 1 phase 120/240V
- 3 phase 120/240V
- 3 phase 277/480V
- 3 phase Primary 7.2/12.47V
- Other

What type of service is being requested?*
- Overhead
- Underground
- Customer Owned Underground
- I don’t know

Are you installing wind, solar panels, or battery backup/storage as part of this project?*
- Yes
- No

Are you adding any large motors (greater than 50hp)?
- Yes
- No

Are you installing a Backup Generator?
- Yes
- No

Back
Next
Click “Submit” when complete
PROJECT STATUS/INFORMATION

- Basic Project Information for all projects created by the user is shown on the home page
- Detailed Information for a specific project is accessed by clicking the project, then “View Edit”
PROJECT STATUS/INFORMATION

Project Status Tracking

Assigned PNM Personnel

Available Forms
PROJECT STATUS/INFORMATION

Previous Forms

Grant Access to Others

No project grants have been initiated for project N50-00001

Grantee Email Address: ______ [Read Only/Read/Write] ___ Add Grant

Attachments

<table>
<thead>
<tr>
<th>Upload Timestamp</th>
<th>Description</th>
<th>Filename</th>
<th>Note</th>
<th>Status</th>
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<tbody>
<tr>
<td>6/2/2021 2:20:35 PM</td>
<td>Utility Site Plan</td>
<td>Utility Site Plan Example.jpg</td>
<td>View</td>
<td></td>
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<tr>
<td>6/2/2021 2:20:31 PM</td>
<td>Grading Plan</td>
<td>Grading Plan Example.jpg</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>6/2/2021 2:20:27 PM</td>
<td>Panel Schedule</td>
<td>Panel Schedule Example.png</td>
<td>View</td>
<td></td>
</tr>
</tbody>
</table>

Communications Sent to PNMRyan.SalzBuchanan@hotmail.com

PNMRyan.SalzBuchanan@hotmail.com has not been sent any communications.

Deadlines

There are no pending deadlines for this project.
Questions?