

# PowerClerk – Registration & Commercial Applications New Service Delivery

**PRESENTED BY:**

**Manuel Quintana – Senior Account Manager**



**Ryan Saiz-Buchanan – Technical Program Manager**



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## PNM PROUDLY SERVING NEW MEXICANS FOR OVER 100 YEARS

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- 530,000 customers in 40 communities across New Mexico
- 15,158 miles of transmission and distribution lines
- 2,701 MW generation capacity



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# AGENDA

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- New Service Delivery Application Processing Update
- Clean Power Research – Historical Background
- What is PowerClerk?
- PowerClerk Benefits
- PowerClerk – 1<sup>st</sup> time User Registration Process
- PowerClerk – Adding Additional Programs
- Commercial Application Completion
- Project Status/Information
- Questions

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# NEW SERVICE DELIVERY UPDATE

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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





Customer Interconnection	Design Engineering	Work Management
<p>Responsibilities include:</p> <ul style="list-style-type: none"><li>• Application Review</li><li>• Document Collection and Review</li><li>• Site Assessments</li><li>• Load Calculations</li><li>• Application Approval:<ul style="list-style-type: none"><li>• To Design Eng for Line Extensions</li><li>• To Work Mgmt for Energization</li></ul></li></ul>	<p>Responsibilities include:</p> <ul style="list-style-type: none"><li>• Project Design</li><li>• Triggering Supplemental Department Reviews</li><li>• Peer Review</li></ul>	<p>Responsibilities include:</p> <ul style="list-style-type: none"><li>• Generation of Agreements/ Contracts</li><li>• Collection of fees</li><li>• Scheduling Excavation/ Line Work</li><li>• Inspections</li><li>• Permit Review</li><li>• Scheduling Energization</li></ul>

# 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	Objectivity	Excellence	Ingenuity
We strive for honesty and integrity in everything we do	We approach problems and evaluate solutions with objectivity	We demand excellence and are always striving for improvement	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

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- 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

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# 1<sup>ST</sup> TIME USER REGISTRATION

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- PNM PowerClerk New Service Delivery Website:
  - <https://pnmnsd.powerclerk.com/MvcAccount/Login>



PowerClerk

## PNM New Service Delivery Program

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

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**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](#)".**

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Log In

Username:

Password:

[Forgot Password?](#)  
[Register a new account](#)





# 1<sup>ST</sup> TIME USER REGISTRATION


- Complete User Information
  - \* Denotes required fields
  - Select Role: Applicant
  - Select Program(s)
  - Click reCAPTCHA
  - Click Register

## Register

*Note: This page is meant for new users to register for PowerClerk. If you already have a PowerClerk account and would like to register for more programs, please log in and visit the Add Programs page under the Settings menu.*

### User Information

Email Address: \*

Password: \* 

Confirm Password: \*


First Name: \*

Last Name: \*

Company (optional):

### Roles And Programs

Role: \*

I'm not a robot   
reCAPTCHA  
Privacy • Terms

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# 1<sup>ST</sup> TIME USER REGISTRATION

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- Registration email

PA PowerClerk Accounts <donotreply@powerclerk.com>  
Wed 6/2/2021 1:39 PM  
To: You



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://pnmsd.powerclerk.com/MvcAccount/ConfirmAccount?id=WUMPAFV6AWHS&key=C\\_LqalG7IGX99f\\_gMnnAcNXkm1\\_Dx8pnPqBWcWWsh\\_y6BAgC7Mg3grKxbOXfleBk&ProgramId=62AAWG33V87](https://pnmsd.powerclerk.com/MvcAccount/ConfirmAccount?id=WUMPAFV6AWHS&key=C_LqalG7IGX99f_gMnnAcNXkm1_Dx8pnPqBWcWWsh_y6BAgC7Mg3grKxbOXfleBk&ProgramId=62AAWG33V87)

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



Reply | Forward



Account Registration Successful

Confirmation successful! Please login to access your PowerClerk account.

# EXISTING USERS: ADDING ADDITIONAL PROGRAMS

Click Settings → Add Programs

The screenshot displays the PowerClerk web application interface. At the top left is the PNM logo, and at the top right is the PowerClerk logo with the text "Welcome, Ryan Saiz-Buchanan | Log Out". Below the logos is a dark blue navigation bar with "HOME", "SETTINGS", and "SUPPORT" links. The "SETTINGS" link is expanded into a dropdown menu containing four options: "My Account", "Grant Access", "Add Programs", and "FormSense". Two red arrows point to the "SETTINGS" link and the "Add Programs" option. Below the navigation bar, the text "PUBLIC SERVICE COMPANY OF NEW MEXICO" is visible, along with a "Change Program" link. A search bar is located on the right side of the page. At the bottom, a table header is visible with columns: "Project #", "WO #", "Application Type", "Project Address", "Project Address City", "Current Status", "Timestamp", and "Excavation Crew".

# EXISTING USERS: ADDING ADDITIONAL PROGRAMS

- Select “Public Service Company of New Mexico” in the Agency Dropdown
- Click Add Program

HOME SETTINGS ▾ SUPPORT

Register for More Programs

Existing Programs

Search

Agency	Program	Role
PNM	New Service Delivery	Applicant

Program to Add

Once you've added a new program, visit your home page and it will appear in your program list.

Agency: Public Service Company of New Mexico ▾

Program: Interconnection Program ▾

Role: Applicant ▾

Add Program

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# EXISTING USERS: ADDING ADDITIONAL PROGRAMS

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- To change between Programs, Select “Change Program” and select applicable program in dropdown



Welcome, Ryan Saiz-Buchanan | Log Out

HOME SETTINGS ▾

SUPPORT

EXICO - NEW SERVICE DELIVERY

[Change Program](#)



Type

▲▼ Project Address

▲▼ Project Address City

▲▼ Current Status

▲▼ Timestamp

▲▼ Excavation Crew



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# PNM – POWERCLERK COMMERCIAL APPLICATION

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From Home Page, Click “New Commercial Application (New and Upgrade)”



Welcome, Ryan Saiz-Buchanan | Log Out

HOME SETTINGS ▾

SUPPORT

PUBLIC SERVICE COMPANY OF NEW MEXICO - NEW SERVICE DELIVERY

Change Program

New Residential Application (New and Upgrade)

New Commercial Application (New and Upgrade)

New Subdivision Application

All Projects

No data available.



# COMMERCIAL APPLICATION- WELCOME

- \* Denotes required fields

Commercial Application (New and Upgrade)

1 Welcome      2 Customer Information      3 Project Details      4 Attachments

We've made improvements to the online application portal to streamline the online request process. All electric service requests must be submitted online.

**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...

Next

# COMMERCIAL APPLICATION- CUSTOMER INFORMATION

Commercial Application (New and Upgrade) Saved ✓

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

**Application Type \***

- Residential - New Construction
- Residential - Upgrade Existing Service
- Commercial - New Construction
- Commercial - Upgrade Existing Service
- Subdivision

**Who is the Primary Point of Contact? \***

Select... ▼

**Primary Point of Contact Information**

**Name \***

First  Last

**Company**

Company

**Address \***

Street

City  ▼ Zip Coc

**Email \***

Email

**Phone \***

(###) ###-####

**Billing Contact Information (Responsible for paying the monthly service bill after construction is complete)**

New Contact ▼

**Name \***

First  Last

**Company**

Company

**Address \***

Street

City  ▼ Zip Coc

**Email \***

Email

**Phone \***

(###) ###-####

**Project Address**

New Contact ▼

**Name**

First  Last

**Company**

Company

**Address \***

Street

City  ▼ Zip Coc

**Email**

Email

**Phone**

(###) ###-####





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# COMMERCIAL APPLICATION- CUSTOMER INFORMATION

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What city is closest to your service address? \*

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?

Back

Next

# COMMERCIAL APPLICATION- PROJECT DETAILS

Commercial Application (New and Upgrade)

Saved ✓

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 20ft 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. Taco Bell, Barnes and Noble, etc.) \*

Business Type \*

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

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

What is the current stage of construction? \* ?

- Design
- Staked
- Construction
- Completed

Electric Service Voltage Requested \*

- 1 phase 120/240V
- 3 phase 120/208V
- 3 phase 277/480V
- 3 phase Primary 7.2/12.47kV
- Other

# COMMERCIAL APPLICATION- ATTACHMENTS

Commercial Application (New and Upgrade)

Saved ✓

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

Do you have a temporary electric permit from the Authority Having Jurisdiction? \*

- Yes
- No

Do you have a pre-final electric permit from your the Authority Having Jurisdiction? \*

- Yes
- No

Is this project being performed on Tribal land? \*

- Yes
- No

Will this project be tax exempt? \*

- Yes
- No

Please contact the PNM New Service Concierge if you have questions before uploading the following documents and specifications:

Electrical One-Line Diagram

 Browse

Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp, .xlsx, .csv, .jpeg

Panel Schedule

 Browse

Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp, .xlsx, .csv, .jpeg

Grading Plan

 Browse

Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp, .xlsx, .csv, .jpeg

Utility Site Plan

 Browse

Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp, .xlsx, .csv, .jpeg

Additional Document Upload:

 Browse

Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp

Additional Document Upload:

 Browse

Allowed file types: .docx, .pdf, .jpg, .png, .tif, .bmp

**IMPORTANT:** Once your electric prefinal permit is issued by your city, county or municipality, please contact PNM Concierge Services at 505-241-3425 to alert them of the permit.

Not notifying PNM of your project permit once issued may create delays in the installation process.

By clicking 'Submit' you acknowledge that the information provided in this application is accurate to the best of your knowledge and understand that inaccurate or incomplete application information could delay your project.

Back

Submit

- 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”

PUBLIC SERVICE COMPANY OF NEW MEXICO - NEW SERVICE DELIVERY - TEST

Change Program

[New Residential Application \(New and Upgrade\)](#) [New Commercial Application \(New and Upgrade\)](#) [New Subdivision Application](#)

All Projects

Project #	Application Type	Division	Project Address	Project Address City	Current Status	Timestamp	Assignee	Temporary In-Service Start Date	Permanent In-Service Start Date	Metro DE	Northern DE	Southern DE	Project Manager
NSD-00001	Commercial - New Construction	Metro	123 Testing Way	Albuquerque	Application Review	06/02/2021	[No Assignee]	06/30/2021	07/28/2021				
<a href="#">View/Edit Project</a>													
	Commercial - New Construction				Unsubmitted	06/02/2021	[No Assignee]						



# PROJECT STATUS/INFORMATION

Project Status Tracking

View/Edit: NSD-00001



Assigned PNM Personnel

**Current Status**

Status marked as **Design Engineering** on 6/2/2021 at 2:30 PM Project Owner: Ryan Saiz-Buchanan (Applicant)

Created on 6/2/2021 at 2:18 PM (11 minutes ago)  
 Last Updated on 6/2/2021 at 2:30 PM (6 seconds ago)

**Project Summary**

<b>Project Manager</b> Andrea Valenzuela (Andrea.Valenzuela@pnm.com)	<b>Metro Design Engineer</b> Darrick Easter (Darrick.Easter@pnm.com)	<b>Northern Design Engineer</b> None	<b>Southern Design Engineer</b> None
<b>Environmental Approval</b> TBD	<b>Joint Use Approval</b> TBD	<b>Planning Approval</b> TBD	<b>Protection Approval</b> TBD
<b>ROW Approval</b> TBD	<b>Transmission Approval</b> TBD	<b>Tree Trimming Required</b> TBD	<b>Peer Review</b> TBD
<b>Crew for Excavation Work</b> TBD	<b>Crew for Line Work</b> TBD	<b>Project Address</b> 123 Testing Way	<b>Project Address City</b> Albuquerque

Available Forms

**Available Forms**

Description	Form Status
Subdivision Preliminary Design Approval	<input type="button" value="Begin"/> New Form Became available on 6/2/2021 at 2:30 PM
Upload Pre-Final Electric Permit (Green Tag)	<input type="button" value="Begin"/> New Form Became available on 6/2/2021 at 2:30 PM



# PROJECT STATUS/INFORMATION

Previous Forms

Grant Access to Others

Previous Forms

Description	Form Status
Commercial Application (New and Upgrade) <a href="#">View</a>	Submitted Last submitted on 6/2/2021 at 2:20 PM

Access Grants For This Project [?](#)

No project grants have been granted for project NSD-00001

Grantee Email Address:

Read Only  
 Read/Write [Add Grant](#)

Attachments

Upload Timestamp	Description	Filename	Note	Status
6/2/2021 2:20:35 PM	Utility Site Plan	Utility Site Plan Example.jpg	<a href="#">View</a>	
6/2/2021 2:20:31 PM	Grading Plan	Grading Plan Example.jpg	<a href="#">View</a>	
6/2/2021 2:20:27 PM	Panel Schedule	Panel Schedule Example.png	<a href="#">View</a>	
6/2/2021 2:20:20 PM	Electrical One-Line / Load Documents	Electrical one_line_Loads Document_Example.pdf	<a href="#">View</a>	

Communications Sent to PNM Ryan.SaizBuchanan@hotmail.com

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

Deadlines

There are no pending deadlines for this project.

# Questions?



