



Colorado Springs Utilities  
*It's how we're all connected*

# Installer Updates

Semi-annual meeting/August 8, 2024

# Agenda

1. Automation portal
2. Process changes
3. Installer Setup

# Automation Portal



Development nearly complete





Go-live 2025 or end of 2024

Old applications will be completed in the manual system - without access in the portal.  
Applications after go-Live can be entered in the portal – without an optional manual process.

# Process changes

# New requirements

- The automation will verify customer information through the utility account.
  - All information is found on the customer bill and account.
    - Obtain the exact information from the customer. Otherwise, the information won't match, which will stop the application from progressing to next steps.
- Application data will be required to match utility account exactly.
  - Examples:
    - middle initial or name spelled out
      - JR, Junior, II
    - account number
    - address as listed on account
    - including spelling and abbreviations (Heights  HTS, Drive  DR)
- After approval permit number will be required.
  - The permit number field will show up after approval is sent.
  - PPRBD permit number required part of the application.
- Site plan and Line diagram
  - Provide the street address on the plans.
  - Verify the address is consistent with the customer account information.

# Document recognition management software (DRM)

Software will scan the listed documents for required information.



- Measured meter photo
  - Place tape measure **on the meter face**
  - Measured height from ground 60-72 inches
- One document per attachment
  - Do not include multiple pages.
  - Combine the documents into one page PDF.
- Line diagram show the required equipment
  - **NEW include load or line (AKA supply side) connection at billing/utility meter**

site plan

meter  
photos

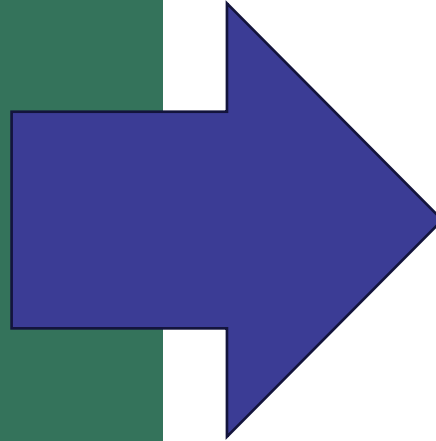
solar  
report

line  
diagram

# Meter measurement

Measure from the ground to the meter face

Place tape measure in front of the meter



# Learning Opportunity pictures

1. Place end of the tape measure at ground level not meter face.
2. Take photo from the front and with measured values clear.
3. Close up of meter face and measurement values at the meter face.

1



2



3





# Equipment and sizing

## Equipment located in dropdown menus

- Select from a prefilled option.
  - Data is directly from the California Energy Commission, CEC, listing
- Inverter, panel, and energy storage system, ESS. Searchable drop down menu.

## System sizing

- Calculated directly from customer usage
- The sizing is 120% of billing usage.
- If less than 4 months billing usage is on the customer account:
  - **Installer: Enter the home's age and size from the El Paso Assessor site: [El Paso County - Colorado \(spatialest.com\)](https://www.spatialest.com)**
- Continue utilizing the calculator for sizing information when designing.
- EV adder provided with a copy of the EV registration (Required).

# New application required

New installer (in process application or installation)

Permit reapproval required due to updates

- Application changes cannot be processed IF...
  - Electric services (ES) is complete
  - PTO has been provided



New application packet

New application fee

New signatures (customer and installer signatures)

# Installer setup

# Setting up initial portal account



THE FIRST-PERSON CREATING THE INSTALLER ACCOUNT WILL AUTOMATICALLY BE THE ADMIN/MASTER FOR THE COMPANY.



THIS PERSON IS RESPONSIBLE FOR UPDATING EMAILS, INSTALLERS, AND COMPANY INFORMATION.



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# Questions?

Please complete the survey with the link below or QR code on the next page.

<https://forms.office.com/r/0jubQ84bD4>

# Installer questions and answers



- **Q: Pictures: Currently taking 1 far out with 36" radius and 1 close up with meter height. Is this still required or is it a combined photo?**
  - A: Two pictures are required 1 wide angle with 36" radius and 1 close up.
- **Q: Customer email: When portal is up and running will the email matching the account be an issue?**
  - A: The email must match the email on the account. The portal will validate customer email. The email is required and must match account. There is an option for an additional email entry if the customer has an additional email.
- **Q: Application Fees: Can the installer pay the application fee in the portal?**
  - A: The existing Kubra site is still available to the installer to pay the application fee. This is a backend process through the customer account; therefore, will not be changed.
- **Q: Provided information: Will the slides be provided?**
  - A: Yes, the meeting recording and Power Point deck will be provided.
- **Q: Change of installers: If an installer picks up an application in process. How will the installer complete the application or installation?**
  - A: The new company needs to be registered in the portal. They would create a new application for the address in the portal. Pikes Peak Regional can continue with the permit, and the permit number can be entered on the new application in order to receive PTO.
- **Q: Is the new portal in Power clerk or Sales force?**
  - A: The portal is developed by ANB. They do interconnections for large utilities. Ground up development specific to Colorado Springs Utilities requirements. The portal is called eTrack+.
- **Q: When is the portal going live?**
  - A: The portal is expected to launch at the end of Q4 or Q1 2025. Development is complete, internal API and integrations are in process. We will provide an additional meeting prior to launch to provide training materials and address additional questions.
- **Q: What about applications that are already submitted via email. When the portal goes live.**
  - A: The applications that are entered manually will be completed in the manual process. They do not need to be entered into the portal. Enter new applications into the portal once the portal goes live – no longer manual process.

# Solar Energy Program Installer Feedback

