POWERCLERK CASE STUDY

PowerClerk® supports fully integrated incentive program management for SMUD

By integrating PowerClerk with back-office systems, Sacramento Municipal Utility District created a seamless application process that facilitates participation across departments and automatically brings in data for evaluating system performance.

SMUD PROGRAM HIGHLIGHTS

- Ten year, ten-step declining incentive plan
- Capacity limits trigger each step change
- $130 million budget with a target capacity of 125 Megawatts
- Two full-time staff handle approximately 50 applications per month

PROGRAM GOALS

- Help fund increased adoption of PV in SMUD territory
- Improve processes and minimize program administration costs
- Integrate with existing back-office systems to increase intra-departmental coordination

BENEFITS OF POWERCLERK

- Reduces paperwork and mailing costs
- Provides a central access point for applicants and SMUD employees in every department
- Tracks both current and legacy programs with flexible platform
- Increases accuracy of application information

The Sacramento Municipal Utility District (SMUD) was a pioneer in offering PV incentives, with programs in place as early as 1984. During the first 22 years of the program, SMUD processed approximately 500 systems, using a simple spreadsheet to track projects. But the program picked up speed rapidly with the passage of California's SB-1 legislation in 2006. Also during this time, SMUD implemented a new ten-step program, with capacity limits triggering each step change.

As the number of applications increased and the program became more complex, SMUD realized they needed new tools for managing their program that would keep their program overhead low, and improve their tracking and reporting capabilities. It was at this point that SMUD began using PowerClerk®.

"PowerClerk has become an enterprise-wide tool that delivers timely and accurate information to the people who need it. This is much more effective than a bunch of words on paper forms that are filed away."

Jim Barnett, Principal Architect - PV Programs, SMUD

An Enterprise-Wide Tool

At first, SMUD used PowerClerk primarily as an application tracking tool, but as their programs grew and PowerClerk's capabilities increased, it became a core part of their process. SMUD now uses PowerClerk for all of its 14 residential and commercial PV programs, both current and legacy.

"We're using PowerClerk to notify all the different stakeholders within SMUD that need to know about solar: interconnection review, post-installation processing, geographic information systems and billing," said Jim Barnett, manager of SMUD's PV incentive programs. "PowerClerk has become an enterprise-wide tool that delivers timely and accurate information to the people who need it. This is much more effective than a bunch of words on paper forms that are filed away."

Clean Power Research®

"We don't have to open mail all day long, or have piles of paper all over our desks…PowerClerk lets us put our attention in the right place so we can allocate our time better." Paula Mitchell, Scheduling Technician, SMUD

By importing historical system data into PowerClerk, SMUD today is able to track all their incentivized PV systems. One important way SMUD uses this information is to verify performance of their entire PV fleet using PVCheck®, PowerClerk's built-in performance checking tool. PVCheck uses SolarAnywhere® – the irradiance data and simulation service from Clean Power Research – to calculate a performance index that indicates whether a system is performing as expected.

"Monthly PV production data are automatically extracted from SAP and stored in PowerClerk, so we know actual production of these systems. We can then use PVCheck to compare actual performance with expected performance," says Barnett.

Less Paper, More Information

The administrative staff also realizes significant benefits. While SMUD received nearly 650 applications in 2011, they still have just two full-time staff processing applications. Applicants now login to PowerClerk and submit applications electronically using the same familiar tool they use for the "big three" investor-owned utilities in California. Even electrical line drawings and permits are submitted as electronic attachments.

According to Paula Mitchell, a scheduling technician at SMUD, "We don't have to open mail all day long,

or have piles of paper all over our desks, and we're notified when an electronic document has been attached by an applicant. PowerClerk lets us put our attention in the right place so we can allocate our time better."

Mitchell continues, "Because of the time saved with PowerClerk, we're able to look at things we didn't look at before. We have a lot better product, and we know what's going on all the time. I can look at PowerClerk and see who has the file, or when the meter is going to be set, and I can answer questions a lot faster. We couldn't have handled the volume we've experienced lately without PowerClerk."
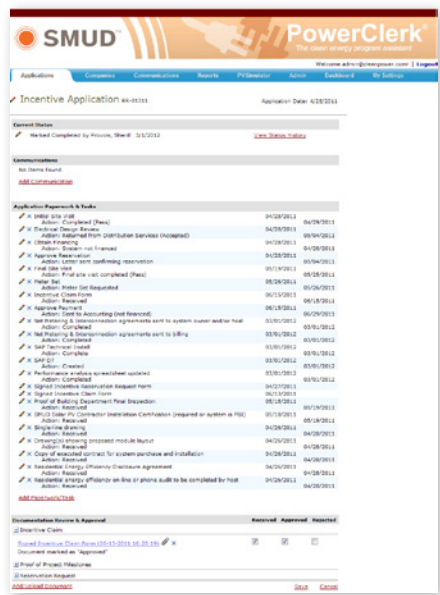
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