

Glossary

The following is a table that lists and defines terms that occur in PowerClerk. This table includes terms located both in the frontend (application processing) and backend (database and reporting) of PowerClerk. It is inclusive of both Section 1 and Section 2 of this document (Application Stats Definitions and Application Status Dates)

PowerClerk Term	Definition
3rd Party Owner	Indicates whether the System Owner is a different entity than the Host Customer for a solar power system [<i>'yes'</i> or <i>'no'</i>]
Account Number	Electrical service account number.
Agency	Administrator of California Solar Initiative applications [<i>'CCSE'</i> (<i>California Center for Sustainable Energy, administering on behalf of San Diego Gas & Electric Company</i>), <i>'PG&E'</i> (<i>Pacific Gas and Electric Company</i>), or <i>'SCE'</i> (<i>Southern California Edison Company</i>)].
All Due Dates	All calendar dates on which items are, or have been, due from the Applicant to the Program Administrator.
All Payment Amounts	Amount of a payment Program Administrator and application participants. Payments directed from Program Administrator to an application participant are recorded as positive amounts; payments directed from application participants to Program Administrator are recorded as negative amounts.
All Payment Dates	Dates on which actions associated with payments were taken.
Applicant	The entity, either the Host Customer, System Owner, or third party designated by the Host Customer, that is responsible for the development and submission of the California Solar Initiative application materials and the main point of communication between the California Solar Initiative Program Administrator for a specific California Solar Initiative Application.
Application Fee	Fee required from application participant to Program Administrator for the processing of all non-residential California Solar Initiative applications with a project size equal to or greater than 10kW [<i>System CEC-AC Rating (in Watts) x EPBB Rate (in Dollars per Watt) x 0.01, rounded to the nearest dollar and capped at a level corresponding to a system size of 1,000,000 watts CEC-AC</i>].
Application Number	Tracking number for California Solar Initiative applications.
Assignee	Contact at Program Administrator assigned to California Solar Initiative application.
Battery Cost	Total cost of batteries in array.
Battery Manufacturer	Name of battery manufacturer.
Battery Model	Model of battery in array.
Battery Quantity	Number of batteries in array.

Calculated CEC PTC Rating	Alternating current output of photovoltaic system under PVUSA Test Conditions as calculated by PowerClerk [<i>Calculated Module PTC Rating x Calculated Inverter Efficiency, in kW</i>].
Calculated CSI Rating	Alternating current output of photovoltaic system under California Solar Initiative rating scheme as calculated by PowerClerk [<i>Calculated CEC PTC Rating x Design Factor, in kW</i>].
Calculated Incentive Amount	California Solar Initiative incentive amount for solar power systems as calculated by PowerClerk [<i>Calculated CSI Rating x Incentive Rate</i>].
Calculated Inverter Efficiency	Weighted average efficiency of inverters in photovoltaic system as calculated by PowerClerk [<i>Sum of (Inverter Quantity x Inverter Rating x Inverter Efficiency) / Sum of (Inverter Quantity x Inverter Rating)</i>].
Calculated Module PTC Rating	Direct current output of photovoltaic system under PVUSA Test Conditions as calculated by PowerClerk [<i>Sum of PV module DC-PTC ratings, in kW</i>].
Calculated Nameplate Rating	Direct current output of photovoltaic system under Standard Test Conditions as calculated by PowerClerk [<i>Sum of PV module manufacturer ratings, in kW</i>].
Calculated Values	Values calculated by PowerClerk corresponding to a solar power system as a whole.
Cancellation Reason	Reason for cancellation.
Cancelled	Application status in which application has been cancelled by Program Administrator.
Cancelled Date	Date that an application was cancelled by the Program Administrator.
CEC PTC Rating	Alternating current output of photovoltaic module under PVUSA Test Conditions in kilowatts.
Completed	Application status in which application incentive has been paid in full.
Completed Date	Date that final incentive check was created and sent to Payee.
Confirmed Reservation	Application status in which application has been approved, and reservation amount has been confirmed. The Program Administrator is waiting for the Applicant to submit the incentive claim form.
Confirmed Reservation Date	Date reservation for project confirmed; Reservation Request accepted for 2-step projects, and Proof of Project Milestones accepted for 3-step projects.
CSI Rating	Alternating current output of photovoltaic module calculated by multiplying the CEC PTC Rating with the Design Factor.
Current [Status]	Applications that are currently in the status(es) selected.
Current Incentive Application Status	Current status of the application in the application process.
Custom Data	A field to allow additional information to be saved in the PowerClerk database. Currently unused for the California Solar Initiative.
Days in Current Incentive Application Status	Number of days the application has been in the current status.

Application Status	
Design Factor	A ratio comparing a proposed system's expected generation output with that of a baseline system. The Design Factor is used in calculating the EPBB incentive (it is multiplied by the system rating and the incentive rate to determine EPBB incentives). A Design Factor is also used by Program Administrators to allocate applications against their MW in step.
Final Payment	Last incentive payment made from Program Administrator to Payee.
Host Customer	An individual or entity that meets all of the following criteria: 1) has legal rights to occupy the Site, 2) receives retail level electric service from Pacific Gas and Electric Company, Southern California Edison Company, or San Diego Gas and Electric Company, 3) is the utility customer of record at the Site 4) is connected to the electric grid, and 5) is the recipient of the net electricity generated from the solar equipment.
Incentive Amount	Total incentive amount corresponding to a California Solar Initiative application.
Incentive Claim Request Review	Application status in which paper copies of the Incentive Claim Request and supporting documentation have been received and are under review by Program Administrator. OR The Incentive Claim was in suspended state, the Applicant submitted new information and Program Administrator is reviewing the incentive claim document. Any applications selected for inspection will remain in this state for the duration of the inspection process.
Incentive Claim Request Review Date	Date Incentive Claim Request form physically received by Program Administrator. OR Date additional information pertaining to Incentive Claim Request is received by Program Administrator.
Incentive Design	Description of incentive rate and incentive type.
Incentive Rate	California Solar Initiative incentive amount per unit output of a solar power system corresponding to the current Incentive Step; EPBB incentives are measured in \$/kW and PBI incentives are measured in \$/kWh.
Incentive Step	Incentive level classification for California Solar Initiative applications; the incentive levels for the California Solar Initiative will be reduced automatically over the duration of the program based on the volume of MW of solar reservations issued through 10 steps.
Incentive Type	Structure of California Solar Initiative incentive: [<i>'PBI' (Performance Based Incentive)</i> or <i>'EPBB' (Expected Performance Based Buydown)</i>].
Initial Payment	First incentive payment made from Program Administrator to Payee.
Inspector	Entity responsible for conducting field inspections of California Solar Initiative applications selected for inspection.

Installer	The System Installer is responsible for installing for the Host Customer the photovoltaic system that will be eligible to receive California Solar Initiative Program incentives. A qualified solar system installer should be able to evaluate factors that will affect photovoltaic system performance, such as the orientation (tilt and direction) of the system, wire length and size, shading, module output mismatch, inverter efficiency, module cleanliness, and other factors.
Internal Incentive Application Id	Internal tracking number for applications in PowerClerk database.
Inverter Cost	Total cost of inverters in an array.
Inverter Efficiency	Efficiency of inverter as measured in accordance with the protocols adopted by the California Energy Commission in the Emerging Renewable Program.
Inverter Manufacturer	Name of inverter manufacturer.
Inverter Model	Model of inverter in array.
Inverter Quantity	Number of inverters in array.
Large Commercial (>=10 kW)	California Solar Initiative applications for solar power systems rated greater than or equal to 10 kW installed on commercial, government, non-profit or public buildings.
Latest Status Dates	Date on which application entered current status in the application process.
Meter Number	Electrical meter number.
Milestone Review Date	Date paper copy of Proof of Project Milestones physically received by Program Administrator. OR Date additional information pertaining to Proof of Project Milestones package is received by Program Administrator.
NAICS Code	North American Industry Classification System Code.
Nameplate Rating	Direct current output of photovoltaic module under Standard Test Conditions in kilowatts.
New Reservation Request	Application status in which application has been created by Applicant but has not been submitted.
Next Due Date	Calendar date on which the next item is due from the Applicant to the Program Administrator.
Next Due Date Description	Description of next item due from the Applicant to the Program Administrator.
Online Incentive Claim Request Submitted	Application status in which Incentive Claim Request has been submitted online but the paper copy has not yet been received by Program Administrator.
Online Incentive Claim Request Submitted Date	Date Incentive Claim Request form submitted online
Online Proof of Project Milestones Submitted	Application status in which Proof of Project Milestone has been submitted online but the paper copy has not yet been received by Program Administrator.
Online Proof of Project Milestones Submitted Date	Date Proof of Project Milestones submitted online.

Online Reservation Request Submitted	Application status in which application has been submitted online but the paper copy has not yet been received by Program Administrator.
Paperwork Details	All calendar dates on which items have either been received or generated by the Program Administrator, and application contacts associated with each of those items [<i>Paperwork Item: Paperwork Date, Contact</i>].
Payee	The person, or company, to whom the incentive check is made payable.
Payment	Payments made between Program Administrator and application participants, such as incentive payments or application fees.
Payment Approved Amount	Payment amount approved by Program Administrator.
Payment Approved Date	Date Payment is approved by Program Administrator.
Payment Closed for Amount Change Amount	Amount of a Payment item that has since been made obsolete and closed due to a change in the payment amount.
Payment Closed for Amount Change Date	Date Payment item made obsolete and closed due to a change in the payment amount.
Payment Completed Amount	Payment received and processed by Program Administrator or Payee.
Payment Completed Date	Date Payment is received and processed by Program Administrator or Payee.
Payment Processed Amount	Payment amount issued or received by Program Administrator.
Payment Processed Date	Date Payment is issued or received by Program Administrator.
Payment Request Withdrawn Amount	Amount of a Payment request that has since been withdrawn by Program Administrator.
Payment Request Withdrawn Date	Date Program Administrator withdrew Payment request.
Payment Requested Amount	Payment amount requested by Program Administrator.
Payment Requested Date	Date Program Administrator sends notification to Applicant requesting Payment.
PBI - In Payment	Application status in which Performance Data Provider data has been received for at least the first PBI incentive payment. Payments will continue monthly based on Performance Data Provider data for a total of 60 months.
Pending Payment (EPBB)	Application status in which Incentive Claim has been approved and a payment request or invoice has been sent to Program Administrator's accounting department. The payment will be issued within 30 days.
Pending Payment (PBI)	Application status in which Incentive Claim has been approved and the letter requesting data from the Performance Data Provider has been sent. Program Administrator is now waiting for Performance Data Provider data in order to make first payment.
Pending Payment Date	Date Incentive Claim Request has been approved as eligible for payment, and claim form forwarded to Program Administrator accounting department for payment. OR Date Incentive Claim Request has been approved, and a letter from the Program Administrator to appropriate parties requesting data from the Performance Data Provider has been sent.

Pending RFP	Application has received conditional approval, funds have been conditionally reserved at the current incentive level and Program Administrator is waiting on Applicant to submit the Request For Proposal or similar solicitation and Proof of Project Milestone checklist.
Pending RFP Date	Date provisional reservation reserved - pending RFP - and all notifications have been sent to the Applicant.
Prior and Current [Status]	Applications that either are currently, or have been previously, in the status(es) selected.
Program	California Solar Initiative Program Administrator ['CCSE', 'PGE', or 'SCE'] and application classification ['Large Commercial (>=10 kW)' or 'Residential and Small Commercial (<10 kW)'].
Program Administrator	Administrator of California Solar Initiative applications ['CCSE' (California Center for Sustainable Energy, administering on behalf of San Diego Gas & Electric Company), 'PG&E' (Pacific Gas and Electric Company), or 'SCE' (Southern California Edison Company)].
Proof of Project Milestones Review	Application status in which paper copies for Proof of Project Milestone and supporting documentation have been received and are under Program Administrator review. OR The Proof of Project Milestone was in suspended state, the Applicant submitted new information and Program Administrator is reviewing the Proof of Project Milestone documents.
PV Module Azimuth	Angle of photovoltaic array as measured by degrees from true north (clockwise).
PV Module Cost	Total cost of photovoltaic modules in an array.
PV Module Manufacturer	Name of photovoltaic module manufacturer.
PV Module Model	Model of photovoltaic module in array.
PV Module PTC Rating	Direct current output of individual photovoltaic module in an array under PVUSA Test Conditions (in kW).
PV Module Quantity	Number of photovoltaic modules in array.
PV Module Tilt	Measure of the angle between a photovoltaic array and a horizontal plane.
PV Module Tracking	Description of the tracking capability of photovoltaic array: Fixed Array OR Single-Axis Tracker OR Dual-Axis Tracker.
Recurring Payment	Repeated incentive payment made from Program Administrator to Payee.
Reservation Request Review	Application status in which paper copies of the Reservation Request Application and supporting documentation have been received and are under Program Administrator review. OR The application was in suspended state, the Applicant submitted new information and Program Administrator is reviewing the reservation request documents.
Reservation Request Review Date	Date paper copy of application physically received by Program Administrator. OR Date additional information pertaining to Reservation Request is received by Program Administrator.

Reservation Reserved	Application status in which application has received conditional approval, funds have been reserved at the current incentive level (or at the RFP – Reservation Reserved incentive level for Gov't/Non-Profit applications) and Program Administrator is waiting on Applicant to submit the Proof of Project Milestone package.
Reservation Reserved Date	Date reservation conditionally reserved for project (and RFP accepted for government, non-profit and public entity projects).
Residential and Small Commercial (<10 kW)	California Solar Initiative applications for solar power systems installed on residential buildings and solar power systems rated less than 10 kW installed on small commercial, government, non-profit or public buildings.
RFP Review (Gov't/Non-Profit only)	Application status in which Program Administrator has received and is reviewing Request For Proposal or similar solicitation documentation and Proof of Project Milestone checklist. OR The application was in suspended state, the Applicant submitted new information and Program Administrator is reviewing the Request For Proposal documents.
Sector	California Solar Initiative division of application participant, based on tax status [<i>'Commercial'</i> , <i>'Government'</i> , <i>'Non-Profit'</i> , or <i>'Residential'</i>].
Seller	Any person or business entity that transfers property or property rights by sale in commerce. To participate in the California Solar Initiative Program, companies who sell system equipment must be certified by the California Energy Commission or some approved third party.
Solar Water Heating Cost	Total cost of solar water heating system.
Solar Water Heating Manufacturer	Name of solar water heating system manufacturer.
Solar Water Heating Model	Model of solar water heating system.
Solar Water Heating Quantity	Number of solar water heating systems.
Status	Each step in the application process that an individual application goes through has an associated status. These statuses are used for project management, program management, and analysis and reporting purposes.
Status Dates (Multiple)	Dates associated with each application status.
Status Notes	Notes associated with each application status.
Subsector	Subdivision of application participant sector.
Suspended - Incentive Claim Request Review	Application status in which Incentive Claim Form has been reviewed and it is incomplete. Notification of incomplete items has been sent to the appropriate parties. Program Administrator is waiting for additional information from the Applicant. Applications that fail the inspection will be placed in this state after the Applicant has been notified.
Suspended – Milestone Review	Application status in which Proof of Project Milestone packet has been reviewed and it is incomplete. Notification of incomplete items has been sent to the appropriate parties. Program Administrator is waiting for additional information from the Applicant.

Suspended - Reservation Review	Application status in which application has been reviewed and is incomplete. Notification of incomplete items has been sent to the appropriate parties. Program Administrator is waiting for additional information from Applicant.
Suspended – RFP Review	Application status in which Request For Proposal has been reviewed and is incomplete. Notification of incomplete items has been sent to the appropriate parties. Program Administrator is waiting for additional information from the Applicant.
Suspended Date	Date of clarification request from Program Administrator to appropriate parties resulting from incomplete Proof of Project Milestones package.
System Owner	The owner of the photovoltaic system at the time the incentive is paid. For example, in the case when a vendor sells a turnkey system to a Host Customer, the Host Customer is the System Owner. In the case of a leased system, the lessor is the System Owner.
System Removed	Application status in which an approved, installed system has been removed from the installation site.
System Removed Date	Date that the system associated with an installed project was physically removed from the installation site.
Total Cost	Total cost of eligible portion of solar power project.
Utility	Electrical utility that provides service to Host Customer.
Withdrawn	Application status in which application has been withdrawn by Applicant or Host Customer.