

DER Interconnection Portal – NM Installer Guide



Table of Contents

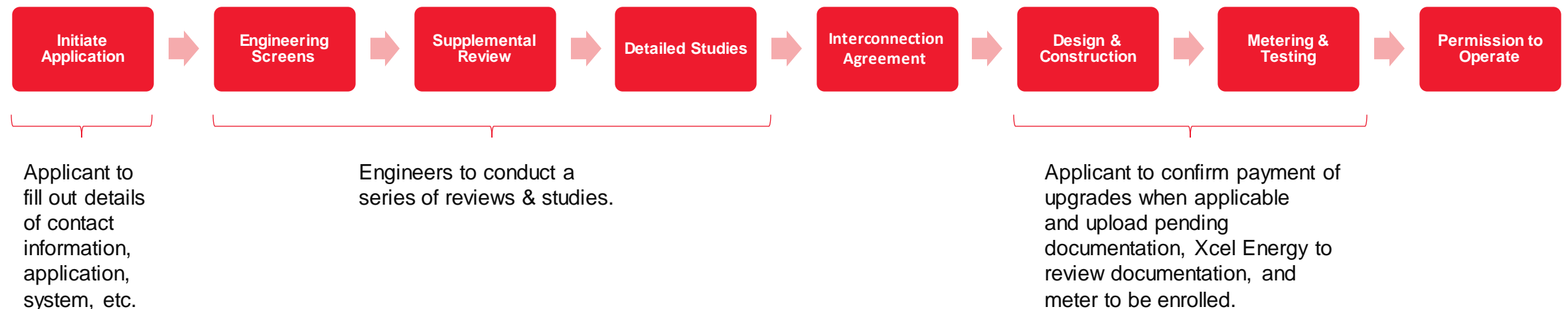
<u>Application Process</u>	3
<u>Application Basics</u>	5
<u>Track Types</u>	12
<u>Log In</u>	13
<u>Creating an Application</u>	14
<u>Initiate Application</u>	18
<u>Engineering Screens</u>	77
<u>Supplemental Review</u>	84
<u>Failed Supplemental Review</u>	92
<u>Redesign and Resubmit Application</u>	96
<u>Scoping Meeting</u>	101
<u>Feasibility Study</u>	107
<u>System Impact Study</u>	116
<u>SIS Supporting Documentation</u>	130
<u>Facilities Study</u>	132
<u>Facilities Study (No Upgrades Required)</u>	145
<u>Transmission Impact Study</u>	146
<u>Interconnection Agreement</u>	153
<u>Design & Construction</u>	165
<u>Final Accounting Report</u>	182
<u>Metering & Testing</u>	192
<u>Witness Test</u>	194
<u>Permission to Operate</u>	197
<u>Upgrades Required</u>	202
<u>Solar*Rewards Community Program</u>	211
<u>Pre-Application Data Request (PADR)</u>	251
<u>Modifications</u>	272

Click to be directed
to each slide

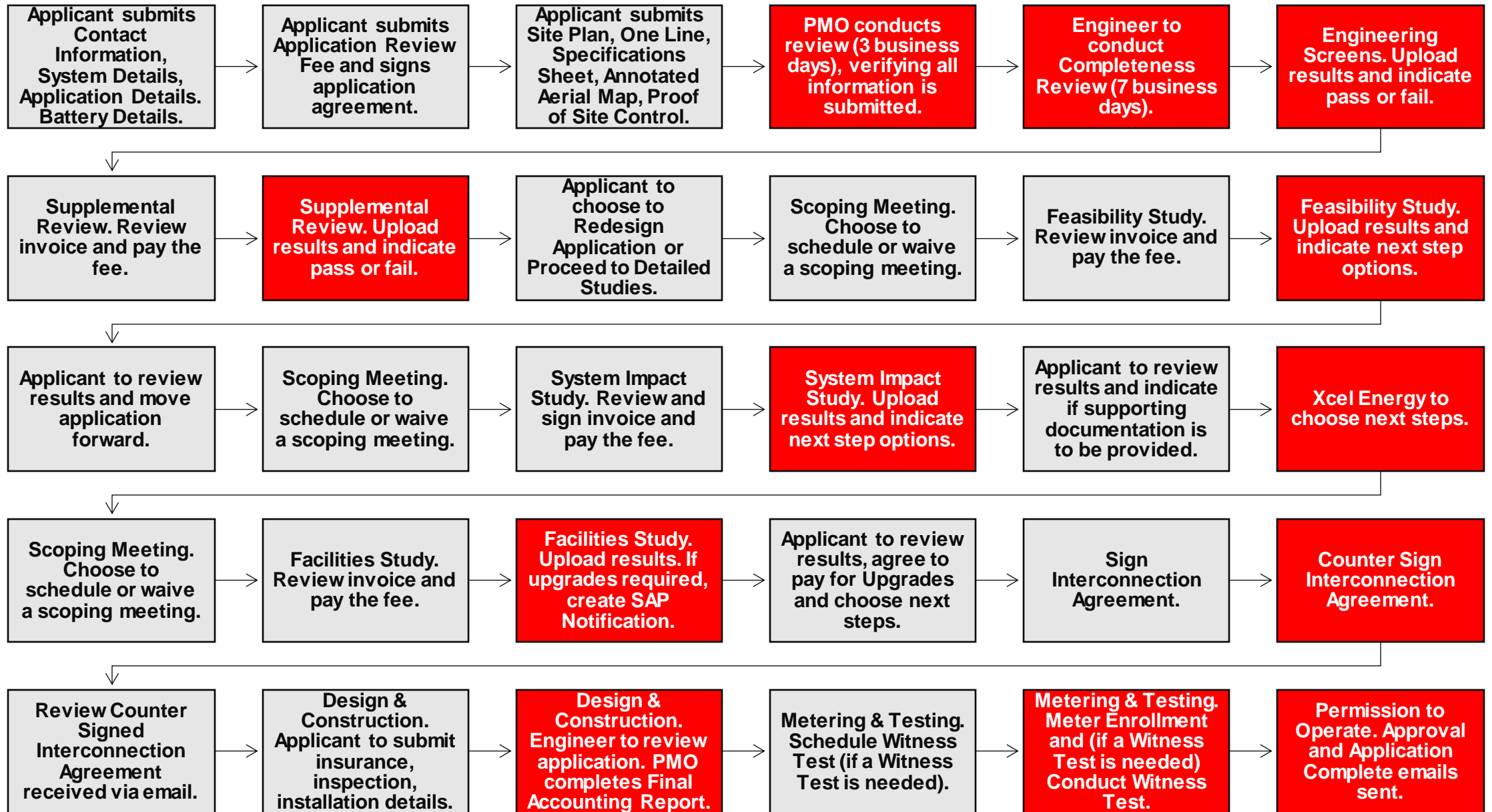
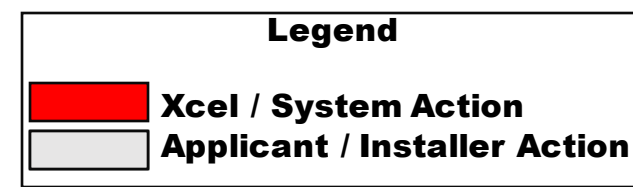
NM Application Process

The portal will guide applicants through the application process to submit interconnection requests to Xcel Energy's grid. Applications can be submitted for customer-sited (behind the meter) interconnections, micro-grids, and pre-application data requests.

Applications can be submitted for the following distributed energy resources (DER) fuel types: Solar, Energy storage, Natural gas, Diesel, Hydro, Wind, Biogas, Geothermal.



NM Application Process



Application Basics

Status, Step, Sub-Step

Case Number

- A case number is a unique identifying number specific to your application

Status

- Throughout the application process, you will move through each status.
- Each status corresponds to a chevron (the tracker at the top of your screen)

Step/ Sub-Step

- At any point in the process, your application will be in a status and step.
- You will not always see a Sub-Step. Sub-Steps are not always applicable.

Open Action

- Actions in “Open” indicate that it is ready to complete.
- If there are “Open” required actions remaining, the application can not proceed to the next status/step.

Draft Action

- Actions in “Draft” indicate that it has been completed, but not yet submitted
- Once all required actions are completed, the application can proceed to the next status/step.

Finalized Action


- Actions in “Finalized” indicate that it has been completed and submitted.
- The action can no longer be edited.
- At this point, the action has been submitted to Xcel Energy for review.

Milestone

- Milestones indicate timelines throughout the application process.
- Current “Open” Milestones will be shown in the “Milestones” tab
- Past “Closed” Milestones will be shown in the “Completed Milestones” tab.

Application Basics

Status, Step, Sub-Step

 Interconnection Application
04110095

[+ Follow](#) [Submit Proposed Modifications](#) [Withdraw](#)

Program Type: Solar*Rewards Community Product: NM - 2023 S*RC RFP (<= 5MW) Track: Fast Track Address: 1901 E PINE LODGE RD

Case #: 04110095
Status: Initiate Application
Step: Draft
Sub-Step:
App Owner: Please enter contact information, system and application details, and other ancillary actions before continuing.

[Save & Continue](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Contact Information	Please provide information about the contacts associated with your application.	Draft	Applicant		Action
System Details	Please provide system details associated with your application	Open	Applicant		Action

Please see Milestones tab for deadline.

Case Number

Step/Sub-Step

Milestones

Status

Track Type

Draft Action

Open Action

Application Basics

Status, Step and Sub-Step

- When an application moves to the next SSS, (when “Save & Continue” is clicked) the existing milestone will be marked as complete, and a new milestone will be triggered.
- The application cannot move to the next SSS if there are open actions. “Save & Continue” can only be clicked when all actions are in “Draft Status.”

Case #: 04388523
Status: Initiate Application
Step: Draft
Sub-Step:
App Owner: Please enter contact information, system and application details, and other ancillary actions before continuing.

[Save & Continue](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Application Details	Please complete supplemental fields to complete your application.	Draft	Applicant	<input checked="" type="checkbox"/>	Action
Contact Information	Please provide information about the contacts associated with your application	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Status, Step, Substep (“SSS”) refers to the stage that the application is currently in.

Actions are triggered by SSS.

Application Basics

Finalized Actions



ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Pre-Application Fee	Please pay the Pre Application Fee through online payment to advance your application to the next step.	Finalized	Applicant		Action
Pre-Application Report Generate	Please upload the Pre-Application Report to advance the application to the next step.	Finalized	Xcel Energy		Action
Site Map	Please provide a site map that includes true north, proposed project location (including general area of project), GPS Coordinates, proposed service point location, and major roads, streets and/or highways.	Finalized	Applicant		Action

Application Basics

Milestones, Completed Milestones

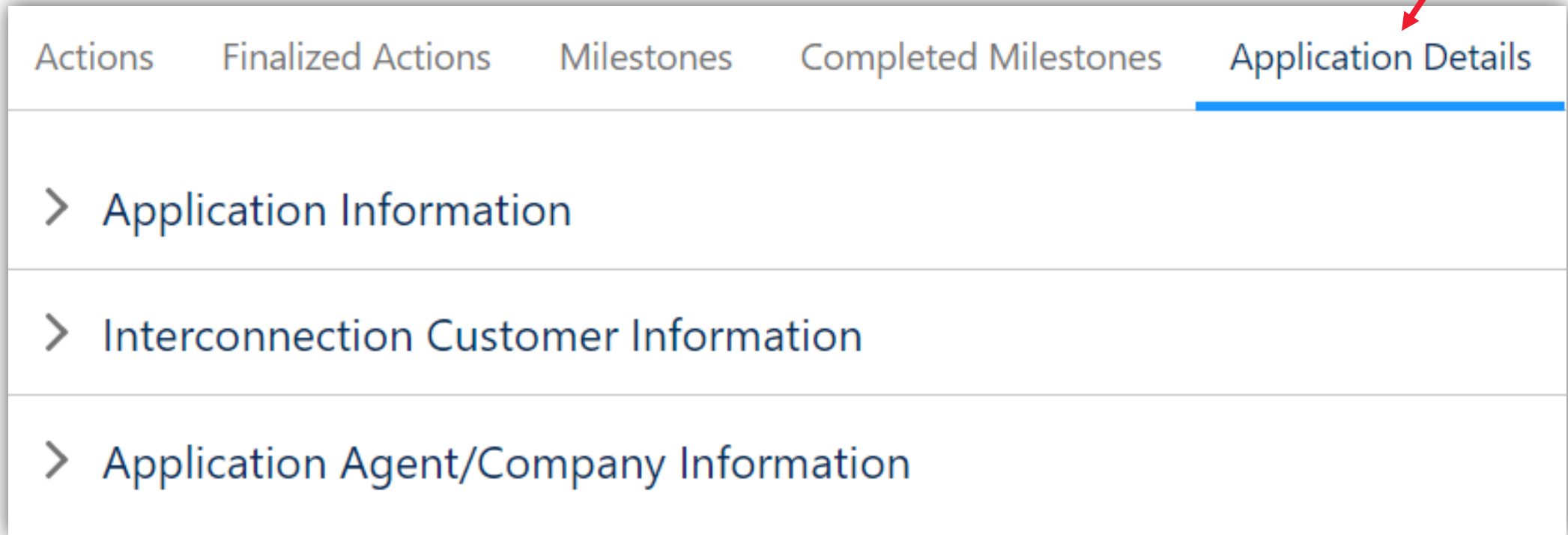
Actions	Finalized Actions	<u>Milestones</u>	Completed Milestones
TITLE	DESCRIPTION		
Interconnection Application Timeline	You have 12 months to complete your application. If an extension is required, reach out to Xcel Energy using the Chatter feature.		
Supplemental Review	Xcel Energy to complete Supplemental Review Screen within 20 business days after receipt of deposit.		

Actions	Finalized Actions	Milestones	<u>Completed Milestones</u>	Application Details
TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	COMPLETED DATE
PMO Review	Xcel Energy PMO to review material and notify applicant within 3 business days.	Xcel Energy	11/17/2023, 01:00 AM CST	11/16/2023, 01:48 PM CST
Completeness Review	Xcel Energy to complete "deemed completeness" review within 7 Business Days.	Xcel Energy	11/17/2023, 01:00 AM CST	11/16/2023, 01:54 PM CST
Deemed Complete Date	The "deemed complete" date for queue position and regulatory	Xcel Energy	11/17/2023, 01:00 AM CST	11/16/2023, 01:55 PM CST

Xcel Energy	11/17/2023, 01:00 AM CST	12/18/2023, 05:30 PM CST
-------------	--------------------------	--------------------------

Application Basics

Application Details



Actions Finalized Actions Milestones Completed Milestones **Application Details**

- > Application Information
- > Interconnection Customer Information
- > Application Agent/Company Information

Application Basics

Tips & Tricks

- Actions are triggered by the status.
- When “Action” is clicked, the screen will open in a new tab.
- Be sure to click "submit"/"close" on the last screen of the action screen to save your changes.
- Once an action is completed, close tab and return to the home screen. Refresh the URL of the home screen to see status changes.
- Be sure to click "submit" once all actions are in draft to ensure the application is in Xcel Energy's queue for review.
- When all *required* actions are in Draft status, the application can move to the next SSS. The application will be able to move forward if there are *optional* actions with Open status.
- When an application attempts to move to the next status, (when “Save & Continue” / “Submit” is clicked) if there are *required* action in Open status, an error will be triggered.
- When an application moves to the next status, (when “Save & Continue” / “Submit” is clicked) the existing milestone will be marked as complete, and a new milestone (if applicable) will be triggered.
- View milestones, completed milestones, finalized actions, and application details in other tabs on the home screen.
- Hover over the "i" beside field names to view help text.

Application Basics

Track Types

What is a Track?

- Each Interconnection Application will have a designated Track Type determined by the AC Nameplate Rating size. See [NM Interconnection Rules](#) for more information.

The screenshot shows an application card for 'Interconnection Application 05367228'. It includes buttons for '+ Follow', 'Submit Proposed Modifications', and 'Withdraw'. A red callout box labeled 'Track Type' points to the 'Track' field, which is 'FastTrack'. Other fields include 'Program Type: Distributed Generation', 'Product: NM - 2023 DG Large (>100kW) C...', 'Address: 111 Test St', and 'City: CARLSBAD'.

- This Track Type determines specific required fields and screens an application will need to go through and will change if the application later requires a Detailed Study.

Track Type	When is this track type triggered?
Simple	AC Nameplate Rating < or = 50kW
Fast Track	AC Nameplate Rating > 50 kW
Detailed Study	Once an application enters one of the Detailed Studies - Feasibility Study, System Impact Study, Facilities Study, Transmission Impact Study.

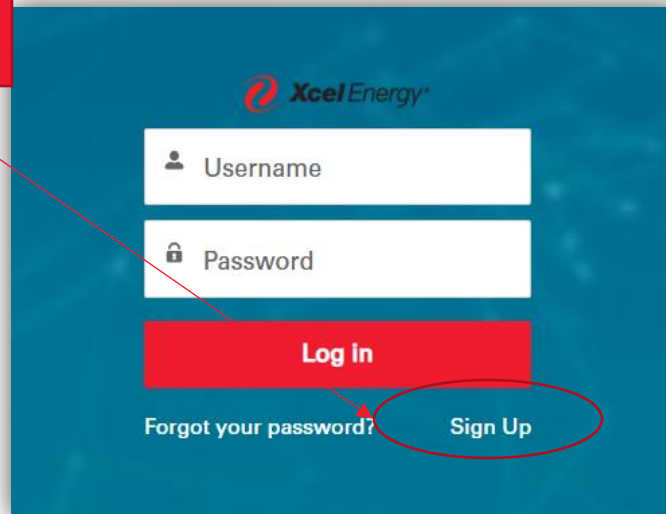
Application Basics

Log In

Use this link to create an account and/or log in:

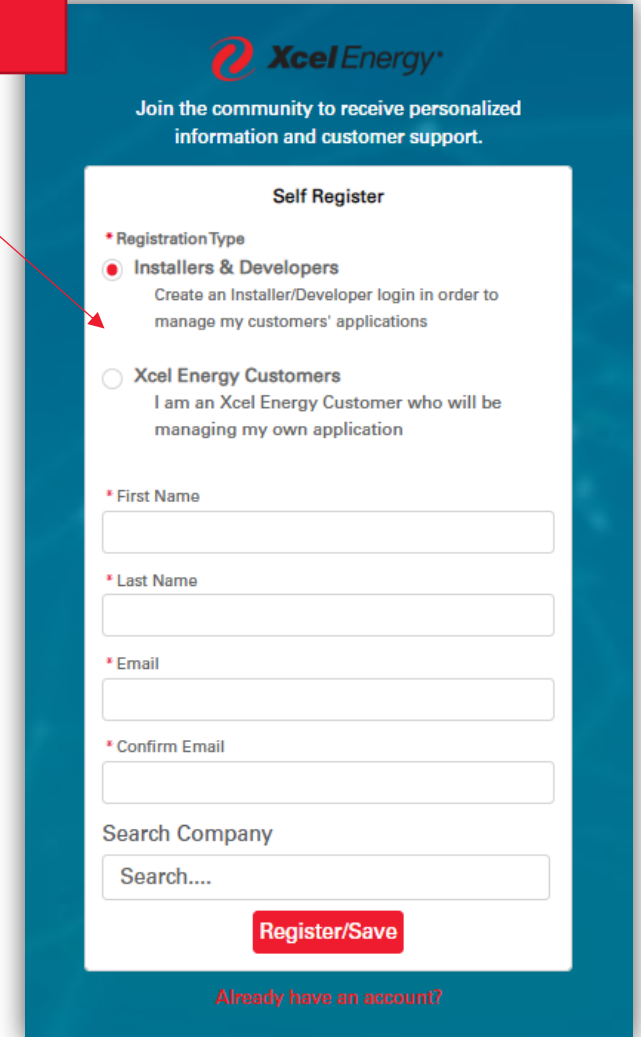
New Salesforce Portal

You will be prompted to log in or sign up.



The login page features the Xcel Energy logo at the top. Below it are two input fields: 'Username' with a person icon and 'Password' with a lock icon. A red 'Log In' button is positioned below the password field. At the bottom, there is a link for 'Forgot your password?' and a 'Sign Up' link, which is circled in red.

After clicking "Sign Up" you will be asked to register. Fill out the required fields.



The registration page is titled 'Self Register' and includes the Xcel Energy logo and a message: 'Join the community to receive personalized information and customer support.' The registration type section has two options: 'Installers & Developers' (selected with a red radio button) and 'Xcel Energy Customers'. Below this are input fields for 'First Name', 'Last Name', 'Email', and 'Confirm Email'. A 'Search Company' field is also present. A red 'Register/Save' button is at the bottom, with a link for 'Already have an account?' below it.


Application Basics

Creating an Application

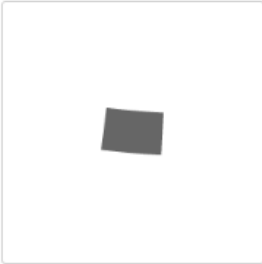
After logging in, you will be able to create an application.

Start a new Interconnection Application


*Select State *Required




Minnesota



Colorado



Wisconsin



New Mexico

Application

Next

Select "New Mexico"

Select "Application"

Click "Next"

Application Basics

Creating an Application






For more information on the specific regulatory rules, click [here](#).

Once you select state and application type, you will be prompted to select a Program Type.

Start a new Interconnection Application

Selected State: **New Mexico**
Selected Application Type: **Application**

*Select Program Type

 Solar*Rewards	 Solar*Rewards Community	 Distributed Generation
 Empower Resiliency	 Renewable Battery Connect	

Back **Next**

Solar*Rewards Community

Distributed Generation

Note: Solar*Rewards, Renewable Battery Connect and Empower Resiliency are not available in New Mexico

Application Basics

Creating an Application

The screenshot shows a web form for creating an application. It includes several required fields: Product Type (a dropdown menu), Address (a text input), City (a dropdown menu), County (a dropdown menu), and Zip Code (a text input). A dropdown menu is currently open for the Product Type field, displaying a list of options: --None--, NM - 2023 Battery Storage Customer Owned, NM - 2023 Battery Storage Third Party, NM - 2023 DG Large (>100kW) Customer Owned, NM - 2023 DG Large (>100kW) Third Party, NM - 2023 DG Medium (10.01-100kW) Customer Owned, NM - 2023 DG Medium (10.01-100kW) Third Party, NM - 2023 DG Small (.05-10kW) Customer Owned, and NM - 2023 DG Small (.05-10kW) Third Party. At the bottom of the form are two red buttons: 'Back' and 'Save'. A red asterisk and the word 'Required' are visible in the top right corner of the form area.

Select a "Product Type". This is the dropdown list for Distributed Generation.

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix

Application Basics

Creating an Application

Congratulations, you successfully started your interconnection application.

Your application number is 05368514

Click "View Application" to start submitting your interconnection application details.

[View Application](#)

Click "New Application" to start a new interconnection application.

[New Application](#)

Take note of your application number (aka "case number"). This is the unique identifying number for this application.

To continue entering information on your new application click "view application."

To start a new application, click "new application."

Initiate Application

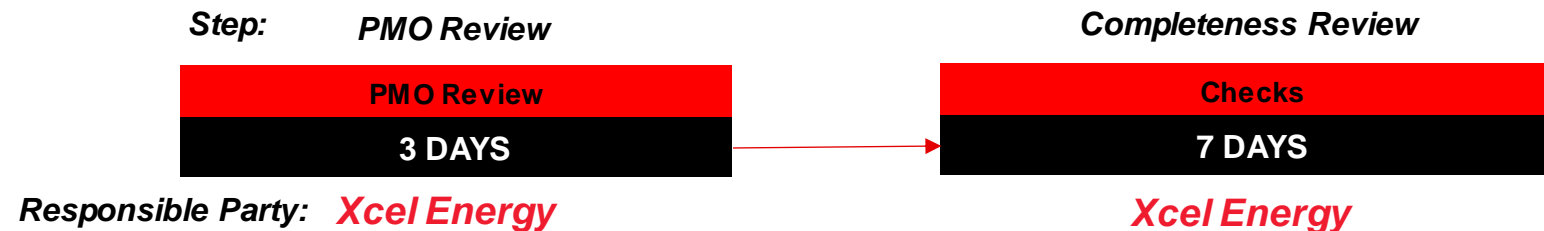
Initiate Application

Process Flow

After creating your application, you will be prompted to complete a series of actions in the Initiate Application status.



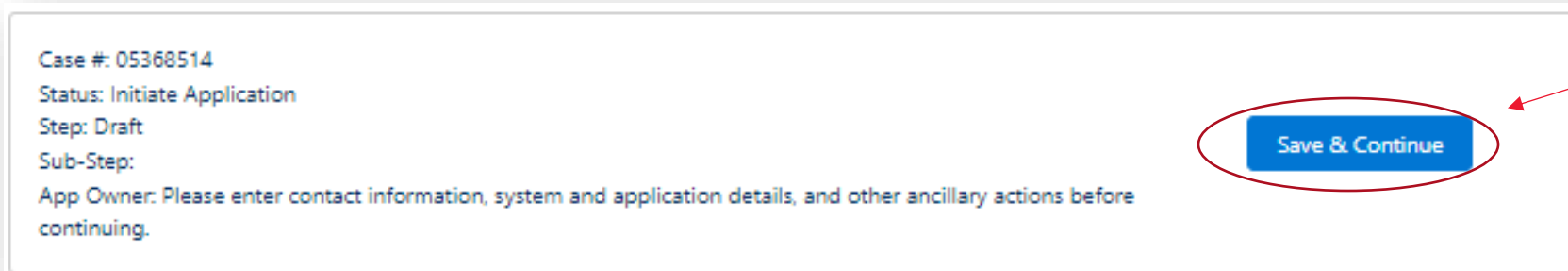
Once you complete the actions for each of the three above steps, you will be able to submit your application to Xcel Energy for review.



Initiate Application

Step: Draft

- After creating your application, you will be in the Draft step of the Initiate Application status. You will be prompted to complete the following: Contact Information, System Details, Application Details, Battery Details (if applicable).



After completing all actions, click "Save & Continue"

For each of these actions, you'll find slides with screenshots & helpful tips:



Initiate Application

Action: Contact Information

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Contact Information	Please provide information about the contacts associated with your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Helpful Tips:

- Click the "action" button to enter contact information.
- Enter required information until you reach the final page, ensure you click "submit."
- Return to the case homepage and click refresh. Your action should now be on "draft" status.
- Once all actions are in draft, click "save & continue" to move to the next stage in the process.

Initiate Application

Action: Contact Information

Having the customer's most recent utility bill on hand when applying for a solar application is highly advised.

Account number:

- Must be a permanent account number.
- Only enter the numbers in between the dashes.
- Do not enter any leading zeros.

Premise number:

- Must be a permanent premise number.
- Temp accounts are not permitted.

Interconnection Customer
(Customer Contact/System Owner)

* Customer Account Number ⓘ

Only numeric values are allowed

* Customer Premise Number ⓘ

SERVICE ADDRESS	ACCOUNT NUMBER	DUE DATE
CUSTOMER NAME STREET ADDRESS CITY, ST 88888-8888	53-#####-3	03/16/2022
	STATEMENT NUMBER STATEMENT	AMOUNT DUE
	##### 02/24/2022	\$113.53

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Contact Information (Customer Contact/System Owner)

Customer meter number

- Not a requirement to start an application, but please populate if the meter number is available.

Legal entity name

- Use if the “Xcel energy account name” is *not* the customer’s legal name.

Phone numbers

- Must be 10 numeric characters and must be in xxx-xxx-xxxx format.

Email

- Use the customer’s primary email address. All esignatures will be sent to this email.
- The customer email address *must* differ from the application agent.

The screenshot shows a web form titled "Interconnection Customer (Customer Contact/System Owner)". The form contains the following fields and elements:

- Customer Meter Number:** An empty text input field.
- * Xcel Energy Account Name:** A dropdown menu with "JESSICA R MITCHELL" selected.
- * Legal Entity Name:** An empty text input field.
- * Phone:** An empty text input field.
- * Email:** An empty text input field.
- Primary Contact Name:** An empty text input field.
- * Is the mailing address the same as the interconnection location?:** A dropdown menu with "--None--" selected.
- Is this a rental property?**
- Back:** A blue button.

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Contact Information (Landlord)

Provide the basic contact information for the Landlord for this application (only needed if “Is this a rental property” was checked on the previous screen).

Landlord

* Landlord Company Name

Complete this field.

* Landlord Full Name

* Landlord Phone

* Landlord Email

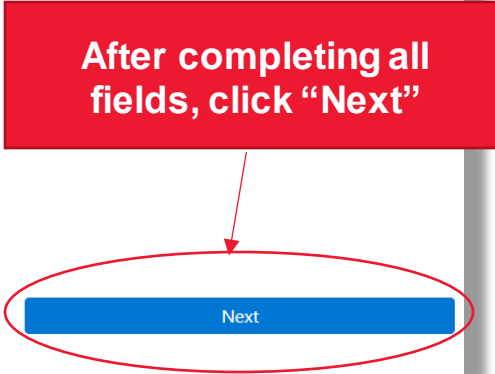
* Landlord Street

* Landlord City

* Landlord State
--None--

* Landlord Zip

After completing all fields, click “Next”



Initiate Application

Action: Contact Information (Application Agent/Company)

Provide the basic contact information for the Application Agent/Company for this application.

Application Agent/Company

Company Name
Solar Sundays

* Full Name
Solar Sundays

* Phone

* Email

* Street

* City

* State
--None--

* Zip

Back

Next

After completing all fields, click "Next"

Initiate Application

Action: Contact Information (Installer/Developer)

Provide the basic contact information for the Installer/Developer for this application, if different from the Application Agent/Company.

The screenshot shows a web form titled "Installer/Developer". The form contains the following fields and elements:

- A dropdown menu for the question "* Is this contact the same as the application agent/company?" with "No" selected. This dropdown is circled in red.
- Text input fields for "Company Name", "* Full Name", "* Phone", "* Email", "* Street", "* City", and "* Zip".
- A dropdown menu for "* State" with "--None--" selected.
- A blue "Back" button at the bottom left.
- A blue "Next" button at the bottom right, which is circled in red.

A red callout box on the right side of the form contains the text "After completing all fields, click 'Next'", with a red arrow pointing to the "Next" button.

Initiate Application

Action: Contact Information (Third-Party System Owner)

Provide the basic contact information for the Third-Party System Owner, if applicable.

The screenshot shows a form titled "Third Party System Owner". It contains two dropdown menus. The first dropdown is labeled "Is this DER system going to be owned by a third party?" and has "Yes" selected. The second dropdown is labeled "Please select the third party system owner" and has "--None--" selected. Below the dropdowns are two blue buttons: "Back" on the left and "Continue" on the right. A red oval highlights the "Continue" button, and a red arrow points from a red box below to it. Another red oval highlights the "Yes" selection in the first dropdown.

Note: indicating a Third-Party system owner will trigger the Host Acknowledgment Form Action (see next slide).

After completing all fields, click "Next"

Initiate Application

Action: Host Acknowledgement Form

This action is only required if this DER application will be owned by a third party.

To upload your documents, click "Action" to open a new tab.

Host Acknowledgement Form	App Owner: Please provide a signed Host Acknowledgement Form.	Draft	Applicant	<input checked="" type="checkbox"/>	Action
---------------------------	---	-------	-----------	-------------------------------------	--------

Click "Upload Files" and submit.

Download [Host Acknowledgement Form](#).

Upload Host Acknowledgement Form

Or drop files

NMHostAcknowledgementForm 10/2/2023, 01:33 AM CDT

Initiate Application

Action: System Details

System Details	Please provide system details associated with your application	Open	Applicant	<input checked="" type="checkbox"/>	Action
----------------	--	------	-----------	-------------------------------------	--------

Helpful Tips:

- Click the "action" button to enter system information.
- Enter required information until you reach the final page, ensure you click "submit."
- Return to the case homepage and click refresh. Your action should now be on "draft" status.
- Once all actions are in draft, click "save & continue" to move to the next stage in the process.

Initiate Application

Action: System Details

If **DER Type = Solar PV, Diesel, Wind, Hydro, Natural Gas, Biomass, Bio-gas, or Geothermal**, the following Site Details fields will be available:

- **Service Voltage:** enter service voltage for the premise.
- **New Construction:** enter yes only if the building/home is a brand-new structure.
- **Electric Vehicle Charged at Premise:** if an EV has been purchased within the last 365 days, please choose yes.
- **Government Entity:** indicate if this is a Government Entity.

*Note: If **DER Type = Battery**, the above fields **will not be available***

This screenshot shows the 'Site Details' form with the 'DER Type' dropdown menu open. The menu lists the following options: --None--, Solar PV, Diesel, Wind, Hydro, Natural Gas, Biomass, Bio-gas, Battery, and Geothermal.

This screenshot shows the 'Site Details' form with the following fields filled in:

- DER Type: Solar PV
- DER Generator Type: --None--
- Service Voltage: --None--
- New Construction: No
- Electric Vehicle Charged at Premise: No
- Government Entity: No

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: System Details

If DER Type = Solar PV, Diesel, Wind, Hydro, Natural Gas, Biomass, Bio-gas, or Geothermal, the following Site Details fields will be available:

- **Estimated Project Cost:** enter the estimated project cost as accurately as possible.
- **System Inverter Phase:** indicate if the proposed system will be one phase or three phase
- **CT Cabinet Needed:** if the proposed system will require a CT cabinet, choose yes. CT cabinets are only required for larger systems (typically 100 kw dc and above).
- **System Replacement & Expansion:** if the system is a replacement and expansion of the existing system, check this box.

Note: If DER Type = Battery, the above fields will not be available

System Details

* Estimated Project Cost

Enter a positive dollar amount. Click back into this field to make your updates.

* System Inverter Phase
--None--

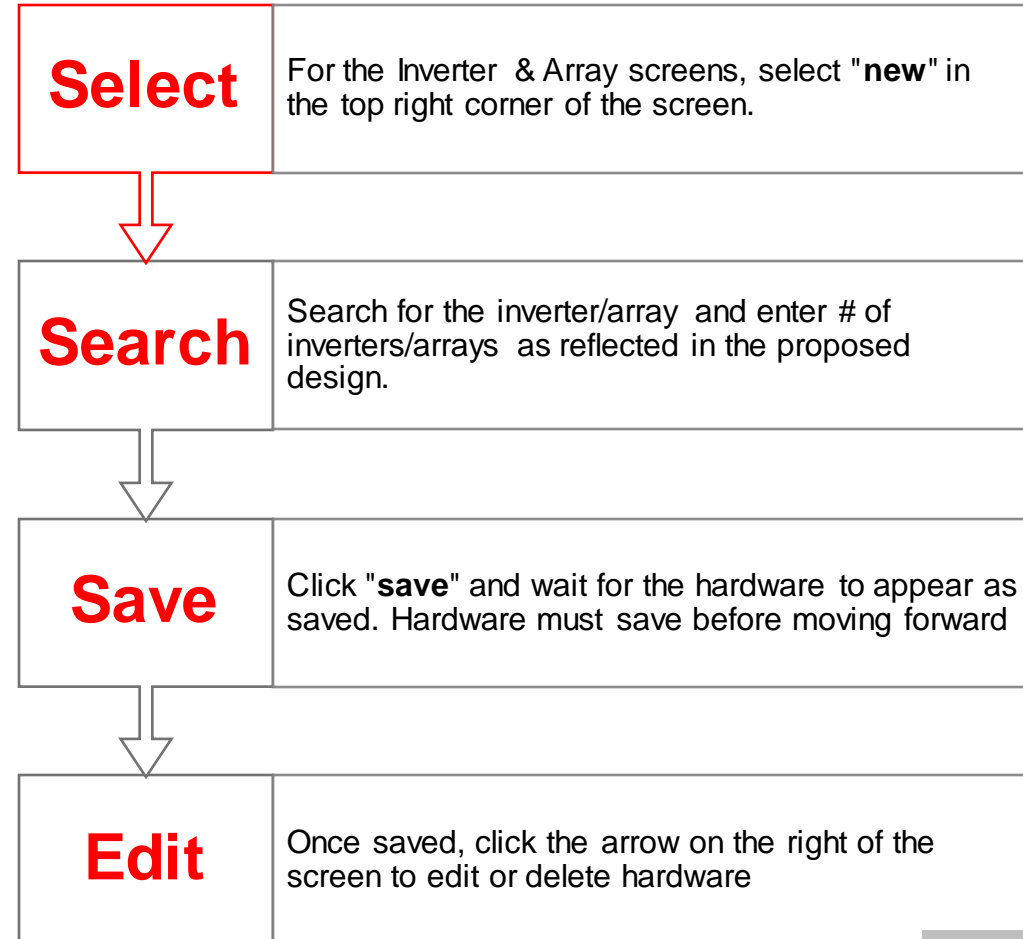
CT Cabinet Needed ⓘ

System Replacement & Expansion

If CT Cabinet Needed = "Yes", Xcel Engineer will receive an email notification.

Initiate Application

Action: System Details



Inverter Details

Manufacturer	Model Number	Power Rating (kW)	Number of Inverters

New Inverter Details

Hardware

Search Hardware...

Number of Inverters

The # of Arrays must be greater than or equal to the # of Inverters

Save

Back Next

Manufacturer	Model Number	Power Rating (kW)	Number of Inverters
SolarEdge Technologies Ltd.	SE5000H-US [240V]	5.054	1.000

Back Next

If DER Type = Battery, the above fields will not be available

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: System Details

- If DER Type = Diesel, Wind, Hydro, Natural Gas, Biomass, Bio-gas, or Geothermal, you will see the Generator Details screen.

New Generator Equipment Details

DER Type
--None--

DER Generator Type
--None--

Manufacturer

Model Number

AC Active Power Nameplate Rating (kW)

Fuel Source
--None--

Other Fuel Source ⓘ

Rated Power Factor (%)

Generator Voltage
--None--

WI Interconnection/Transfer Method
--None--

Rated Current (Amperes)

Exporting Energy?
--None--

Duration Parallel
--None--

Certified

Save

Generator Equipment Details

DER Type	DER Generator Type	Model Number	Manufacturer	Generator Voltage

Back

Next

New

Click on “New” and populate the fields regarding your generator. Once complete, click “Save”

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: System Details

- The summary screen will reflect the hardware entered/saved.
- Review this screen carefully
- Click "**next**" if this information is correct.
- You may edit your hardware by clicking "**back**" if changes need to be made.

Summary

Number Of Panels
12.00

Number of Inverters
1

DC Nameplate Rating (kW)
4.39

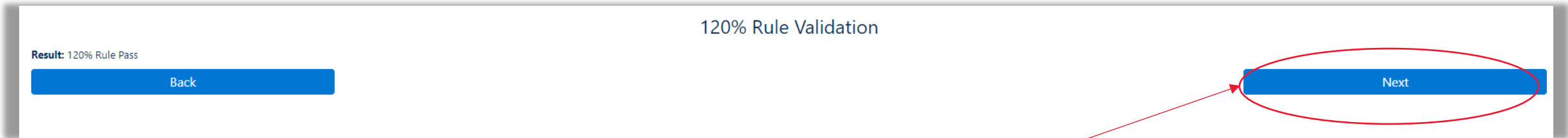
AC Active Power Nameplate Rating (kW)
5.054

System PV Watts (kWh)
6,796.388

Initiate Application

Action: System Details

- If your system size does not exceed 120%, then you will receive the below message:



Click "Next" to advance to the next step.

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: System Details

- If your system size exceeds 120%, then you will receive the below error:

120% Rule Validation

Result: 120% Rule Fail - System Size Exceeds 120%

BackNext

- After saving the System Details Action & refreshing the application, you will need to complete the 120% Rule Support Documentation Action

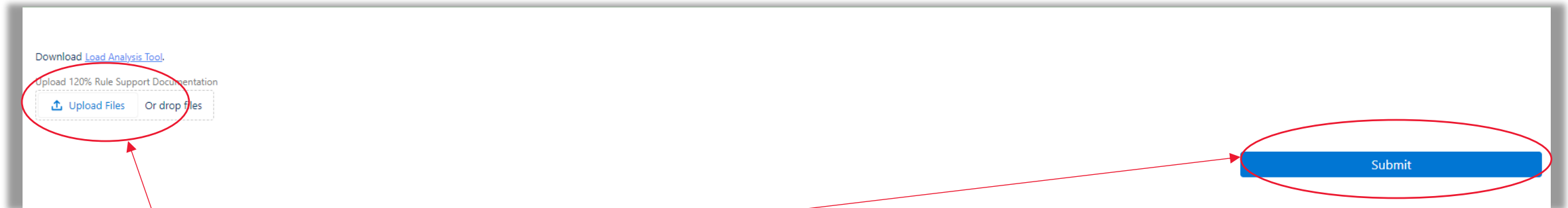
ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
120% Rule Support Documentation	120% Rule Failed. Please provide the appropriate support documentation based on the failure type (viewable in the Applications Details tab).	Open	Applicant	<input checked="" type="checkbox"/>	Action

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: 120% Rule Support Documentation

- After saving the System Details Action & refreshing the application, you will need to complete the 120% Rule Support Documentation Action



Upload your 120% Rule Support Documentation & click "Submit"

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: System Details; 120% Rules Failed

- If the system size exceeds 120%, the applicant will receive the below error:

120% Rule Validation

Result: 120% Rule Fail - System Size Exceeds 120%

Back
Next

- After the applicant completes the 120% Rule Support Documentation Action, Xcel Energy will have to **manually update the System Details action to Draft status.**

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
120% Rule Support Documentation	120% Rule Failed. Please provide the appropriate support documentation based on the failure type (viewable in the Applications Details tab).	Open	Applicant	<input checked="" type="checkbox"/>	Action

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Application Details	Please complete supplemental fields to complete your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Helpful Tips:

- Click the "action" button to enter application details
- Enter required information until you reach the final page, ensure you click "submit."
- Return to the case homepage and click refresh. Your action should now be on "draft" status.
- Once all actions are in draft, click "save & continue" to move to the next stage in the process.

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Details – Simplified (Standard) Interconnection Application Screen

- When Track Type = **Simple Track**, this screen will be titled “**Simplified Interconnection Application**”
- When Track Type = **Fast Track**, this screen will be titled “**Standard Interconnection Application**”

Additional fields may be available/required based on the below conditions:

Field	Field Trigger Condition
*Existing DER Size (AC kW)	If Is there an existing DER? == "Yes"
*Number for DER Units	If More than one Inverter pursuant to this application? == "Yes"
*Aggregate Active Power AC Nameplate Rating (kW)	If More than one Inverter pursuant to this application? == "Yes"
*Aggregate Active Power AC Nameplate Rating (kVAac)	If More than one Inverter pursuant to this application? == "Yes"
Other	If Prime Mover == "Other (State Type)"

The screenshot shows a web form for initiating an application. Key elements include:

- Question: "Is there an existing DER?" with "Yes" and "No" buttons. A red circle highlights this question and its buttons.
- Question: "More than one Inverter pursuant to this application?" with "Yes" and "No" buttons. A red circle highlights this question and its buttons.
- Field: "Apparent Power AC Nameplate Rating (kVAac)" with an input box.
- Field: "Nameplate rating: (AC Volts)" with an input box.
- Question: "Is export controlled to less than the Total Aggregate Nameplate Rating?" with "Yes" and "No" buttons. A red arrow points to this question from the dropdown menu.
- Field: "Export Capacity Value (kW)" with an input box.
- Field: "Prime Mover" with a dropdown menu showing options: "--None--", "Photovoltaic", "Microturbine", "Reciprocating Engine", "Fuel Cell", "Gas Turbine", "Steam Turbine", "Wind Turbine", and "Other (State Type)". A red circle highlights the dropdown menu.
- Field: "DER Location if different from customer address" with an input box.
- Question: "Energy Storage Included?" with "Yes" and "No" buttons.
- Field: "Estimated In-Service Date" with a date picker.
- Field: "Estimated Installation Date" with a date picker.

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Details – Simplified (Standard) Interconnection Application Screen (2nd Screen)

- When Track Type = **Simple Track**, this screen will be titled **“Simplified Interconnection Application”**
- When Track Type = **Fast Track**, this screen will be titled **“Standard Interconnection Application”**

Additional fields may be available/required based on the below conditions:

Field	Field Trigger Condition
Control Power Setting	If Control Type == "Power Control System"
*Type of Interconnect Service Applied for	If Track Type = Fast Track

The screenshot shows a web form with several fields. Two dropdown menus are open, showing their options. Red circles and arrows highlight these menus.

- * Control Type** dropdown options: --None--, Reverse Power Protection, Minimum Power Protection, Relative Distributed Energy, Configured Power Rating, Resource Rating, Power Control System, Directional Power Protection, None, Export Control using mutually agreed-upon means.
- * Type of Interconnect Service Applied For:** dropdown options: --None--, Unrestricted mode, Export only mode, Import only mode, No exchange mode, Export-limiting from all sources, Export limiting from ESS, Import limiting to ESS.

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Details – Point of Common Coupling Location (3rd Screen)

- When Track Type = **Simple Track**, this screen will be titled “**Point of Common Coupling Location**”
- When Track Type = **Fast Track**, this screen will be titled “**Point of Common Coupling Location**”

The screenshot shows a web form with the following sections:

- * PCC GPS Coordinates**: A text input field with a red border and a red error message below it: "Enter/Select a valid value."
- Where is the desired RPA location? [Check one]**: A dropdown menu with "--None--" selected. A red arrow points from this dropdown to a larger, expanded view of the dropdown options on the right.
- Is the RPA location the same as above for detection of abnormal voltage, faults and open-phase conditions?**: Two radio buttons labeled "Yes" and "No".
- Why does this DER fit the chosen RPA? [Check all that apply]**: A list of three checkboxes with corresponding text:
 - Zero-sequence continuity between PCC and PoC is maintained
 - The DER aggregate Nameplate Rating is less than 500 kVA
 - Annual average load demand is greater than 10% of the aggregate DER ...

The expanded dropdown menu on the right shows the following options:

- None--
- None--
- Point of DER connection (PoC)
- Point of interconnection / point of common coupling (PCC)
- Another point between PoC and PCC
- Different RPAs for different DER units

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Details – Standard Interconnection Application (4th Screen)

- When Track Type = **Simple Track**, this screen **will not be triggered**
- When Track Type = **Fast Track**, this screen will be titled **“Standard Interconnection Application”**

Additional fields may be available/required **based on the below conditions:**

Field	Field Trigger Condition
Summer Kw	If Does DER have different summer and winter ratings? == “Yes”
Summer kVA	If Does DER have different summer and winter ratings? == “Yes”
Winter kW	If Does DER have different summer and winter ratings? == “Yes”
Winter kVA	If Does DER have different summer and winter ratings? == “Yes”

Does DER have different summer and winter ratings?

Yes No

Summer Nameplate kW

Summer Nameplate kVA

Winter Nameplate kW

Winter Nameplate kVA

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Details – Standard Interconnection Application (5th Screen)

- When Track Type = **Simple Track**, this screen **will not be triggered**
- When Track Type = **Fast Track**, this screen will be titled **“Standard Interconnection Application”**

Individual Generator Rated Power Factor Set Point ⓘ

Power Factor ⓘ

--None--

Back

Power Factor ⓘ

--None--

--None--

Leading (absorbing vars)

Lagging (injecting vars)

Unity

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Details – Standard Interconnection Application (6th Screen)

- When Track Type = **Simple Track**, this screen **will not be triggered**
- When Track Type = **Fast Track**, this screen will be titled **“Standard Interconnection Application”**

Additional fields may be available/required based on the below conditions:

Field	Field Trigger Condition
*Customer Transformer Phase	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
*Customer Transformer kVA Base	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
*Customer Transformer Impedance (%)	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Customer Transformer kVA Base	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Primary Winding	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Primary Voltage	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Secondary Winding	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Secondary Voltage	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Teriary Winding	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Teriary Voltage	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"

Note: This example shows specific requirements for a **Distributed Generation** application. Requirements for other programs will vary. **For more details/screenshots for Solar*Rewards Community, please see the Appendix.**

Initiate Application

Action: Application Details – Standard Interconnection Application (6th Screen)

- When Track Type = **Simple Track**, this screen **will not be triggered**
- When Track Type = **Fast Track**, this screen will be titled **“Standard Interconnection Application”**

Additional fields may be available/required based on the below conditions:

Field	Field Trigger Condition
*Fuse Type	If Customer-owned Fuse? == "Yes"
Fuse Manufacturer	If Customer-owned Fuse? == "Yes"
*Fuse Size	If Customer-owned Fuse? == "Yes"
Fuse Speed	If Customer-owned Fuse? == "Yes"
*Breaker Manufacturer	If Customer-owned Circuit Breaker == "Yes"
*Breaker Type	If Customer-owned Circuit Breaker == "Yes"
*Breaker Continuous Rating	If Customer-owned Circuit Breaker == "Yes"
*Breaker Interrupting Rating	If Customer-owned Circuit Breaker == "Yes"
Breaker Trip Speed	If Customer-owned Circuit Breaker == "Yes"

* Will a transformer be used between the DER and the Point of Common Coupling?

Yes No

Enter/Select a valid value.

Customer-owned Fuse?

Yes No

* Customer-owned Circuit Breaker?

Yes No

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Details – Standard Interconnection Application (7th Screen)

When Track Type = **Simple Track**, this screen **will not be triggered**

When Track Type = **Fast Track**, this screen will be titled **“Standard Interconnection Application”**

Additional fields may be available/required **based on the below conditions:**

Field	Field Trigger Condition
*Relay Type	If Interconnection Protective Relays Used? == "Yes"
Is the prime mover compatible with the certified protective relay package?	If Interconnection Protective Relays Used? == "Yes"

* Interconnection Protective Relays Used?

 Enter/Select a valid value.

External Current or Potential Transformer Used? ⓘ

List of adjustable set points for the protective equipment or software ⓘ

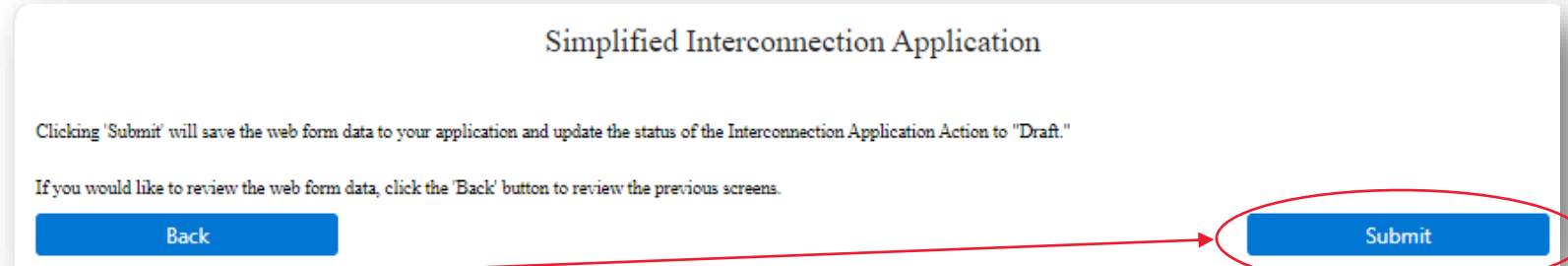
Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Details

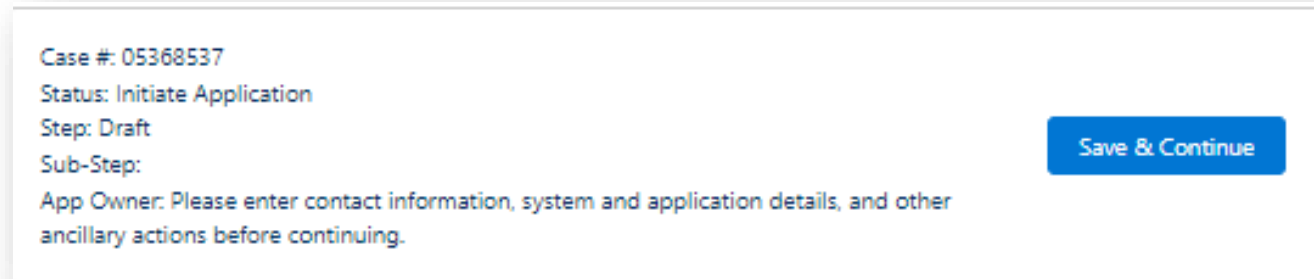
1

After completing the “Application Details” Action, click “Submit”.



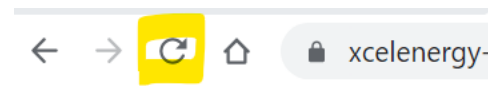
2

Return to the IA page,



3

...and refresh.



When Track Type = **Simple Track**, this screen will be titled “**Simplified Interconnection Application**”

When Track Type = **Fast Track**, this screen will be titled “**Standard Interconnection Application**”

Initiate Application

Action: Battery Details

- If “Energy Storage Included” was marked as yes, a new action will appear, called “Battery Details”.

Battery Details

Please complete supplemental application fields regarding your energy storage system.

If “Storage as a component of DER”, you will be prompted to answer (2) additional fields:

- (1) Existing DER Type
- (2) Existing DER Size (kW AC)

* Application for: ⓘ

Storage as a component of DER

--None--

Stand-alone storage as DER

Storage as a component of DER

* Existing DER Type?

--None--

--None--

Battery

Bio-gas

Biomass

Diesel

Geothermal

Hydro

Natural Gas

Solar PV

Wind

* Existing DER Size (kW AC)

Enter a positive number with up to three decimal places. Click back into this field to make your updates.

Initiate Application

Action: Battery Details

Complete Remaining Fields

Manufacturer specification sheet(s) are required to be additionally attached.

* Is the storage 100% charged by a net energy metering eligible energy source? ⓘ

Yes
--None--
Yes
No

* Source charging the storage (check all that apply) ⓘ

Utility
Solar
Diesel
Other

Wind

If Other, please provide the other source charging the storage

* Is the storage configured to export energy to the Area EPS? ⓘ

Yes
--None--
Yes
No

* Are the settings accessible to the end user?

Yes
--None--
Yes
No

* What is the process for changing operational modes of the energy storage?

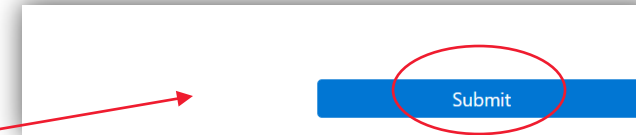
test

Initiate Application

Action: Battery Details

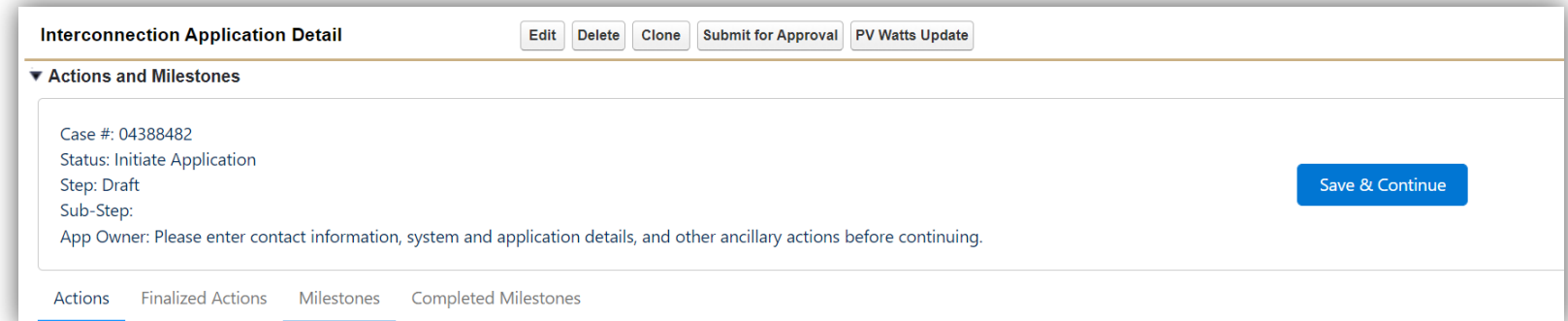
1

After completing the “Battery Details” Action, click “Submit”.



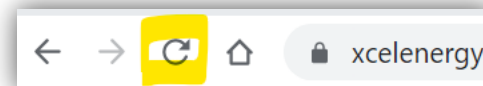
2

Return to the IA page,



3

...and refresh.



Track Type: Simple

Initiate Application

Step: E-signatures & Payments

- After clicking 'Save & Continue' in Initiate Application/Draft, you will be in the E-signatures and Payments step of the Initiate Application status. You will then be prompted to pay the Application Fee through Wells Fargo.

Case #: 05368537
Status: Initiate Application
Step: Esignatures and Payments
Sub-Step:
App Owner: Please submit payment and sign all required eSignature documents (sent via email) to advance your application to the next steps. Please view submitted information associated with your application in the Application Details tab.

Save & Continue

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Application Fee	Please pay the Application Fee through online payment to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action
SGIA	Please complete the interconnection application for small generator system form.	Open	Applicant	<input checked="" type="checkbox"/>	Action

After completing this action, click "Save & Continue"

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix

For the following action, you'll find slides with screenshots & helpful tips:

Application Fee

SGIA

Initiate Application

Step: E-signatures & Payments

- After clicking 'Save & Continue' in Initiate Application/Draft, you will be in the E-signatures and Payments step of the Initiate Application status. You will then be prompted to pay the Application Fee through Wells Fargo.

Case #: 05368541
Status: Initiate Application
Step: Esignatures and Payments
Sub-Step:
App Owner: Please submit payment and sign all required eSignature documents (sent via email) to advance your application to the next steps. Please view submitted information associated with your application in the Application Details tab.

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Application Fee	Please pay the Application Fee through online payment to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Initiate Application Esign	Please check your email and sign all required eSignature documents to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action

After completing this action, click "Save & Continue"

For the following action, you'll find slides with screenshots & helpful tips:

Application Fee

Initiate Application Esign

Initiate Application

Action: Application Fee

- For more information on the Application Fee amounts calculated based on AC Nameplate Rating and Export/Non-Export requirements, see the [NM Interconnection Rules](#).

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Application Fee	Please pay the Application Fee through online payment to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Export Capability?	AC Active Power Nameplate Rating	Application Fee Amount
Limited Export	< or = 25kW	\$150.00
	> 25kW and < or = 100kW	\$300.00
	> 100kW	\$300.00 + \$1.00 per kW
Non-Export	< 100kW	\$150.00
	> or = 100kW	\$300.00

Note: For DER Type Battery and AC Active Power Nameplate Rating less than 100kW, the Application Fee Amount is \$150.

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Application Fee

Please see directions below for online payment. If preferred, fee(s) can always be paid traditionally via check/wire and form.

- Fee invoice(s) are available now on the Wells Fargo payment site.
- The invoice(s) are ready for online payment.
- Payments will post to the applicable application ID the day after payment is made to Wells Fargo (another 24 hours).
- Please enter Primary Authorization Code **SR-10937239** and Secondary Authorization Code **321111** to complete online payment with Wells Fargo.
- Primary and Secondary codes are unique to your account. Once an account is set-up, you can use the same codes for each application as needed.
- Credit card payment will not be accepted.

Take note of the computer generated "Primary Authorization Code" and "Secondary Authorization Code".

Payment Details:

Item Description	Invoice Number	Amount Due	Due Date	Payment Status
Application Fee	05368537-PN-0035530	\$150.00	Nov 15, 2023	Not Paid

Please click the 'Pay Fee Online' button for online payment.

Pay Fee Online

Click "Pay Fee Online"

Initiate Application

Action: Application Fee

Wells Fargo payment steps (one-time payment):

- Open "make payment" tab
- Use Primary and Secondary authorization codes
- Authorization codes located within Fee Action

Wells Fargo payment steps (registered):

- Use your login credentials to login into your account
- Your Wells Fargo credentials will differ from your DER portal credentials
- Your invoice will appear in the top right corner

The screenshot shows the Wells Fargo login interface. At the top, there are two tabs: "LOGIN" and "MAKE PAYMENT". Below the "LOGIN" tab, there is a red-bordered box labeled "Registered Users". Below the "MAKE PAYMENT" tab, there is a red-bordered box labeled "One-Time Payments". The login form includes a "Login ID" field, a "Password" field, and a green "Login" button. There are also links for "Forgot your Login ID?" and "Password Help?".

Track Type: Simple

Initiate Application

Action: SGIA

- This action will only be required for Simple Track applications. See [NM Interconnection Rules](#) for more information.
- The customer will receive an email with a link to sign this agreement via Sertifi.
- Note: the Application Agent will be cc-ed on this eSignature email.

SGIA

Please complete the interconnection application for small generator system form.

Open

An email has been sent to you and/or the interconnection customer with a link to e-sign documents. Please view the status table below.

Once all of the signatures have been collected, the action will be marked as "Draft" and the application will be able to advance to the next step.

Document Title	Activity	Signer	User
	Signer invited	Customer	regina.calvo.salinas@accenture.com

Customer's email.

Xcel Energy

Work Request

Simplified Interconnection Application
Certified Inverter-Based Generating Facilities
With an Export Capacity up to and including 25 kWAC and a Nameplate Rating not exceeding 50 kW

Processing Fee
A fee of \$150 must accompany this Application.

Interconnection Customer Signature
I hereby certify that, to the best of my knowledge, the information provided in this Application is true. I agree to abide by the Terms and Conditions for Interconnecting an Inverter-Based Generating Facility with a nameplate rating that does not exceed 50 kilowatts (kW) and an export capacity that does not exceed 25 kilowatts (kW) and return the notice of completion when the Generating Facility has been installed.

Signature: (Type Name)
Title:
Date: 11/18/2023

Utility Signature
The undersigned Utility agree to abide by the Terms and Conditions and that optional paragraph 6.0
Indemnification
 applies
 does not apply

Signature:
Title:
Date:

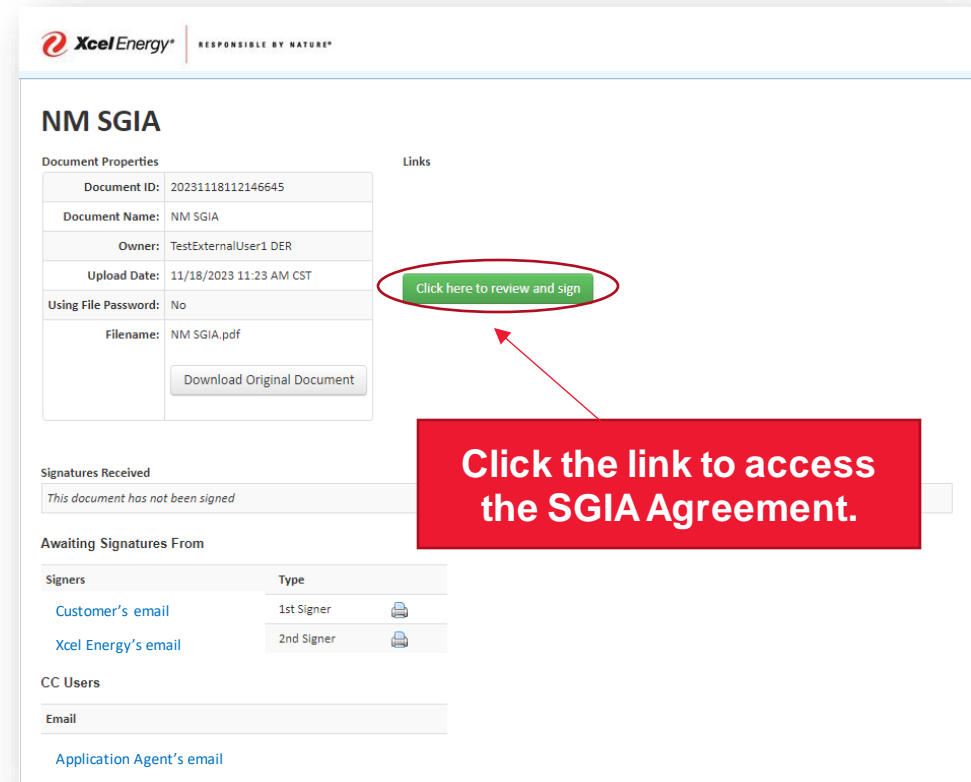
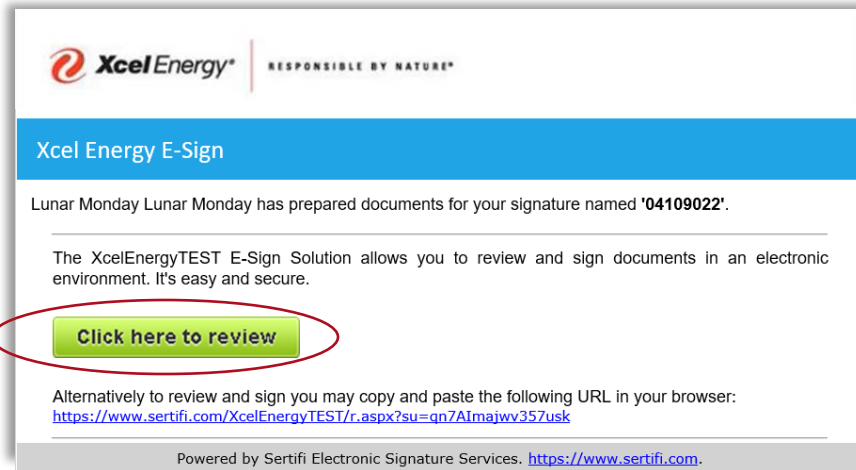
Action

Track Type: Simple

Initiate Application

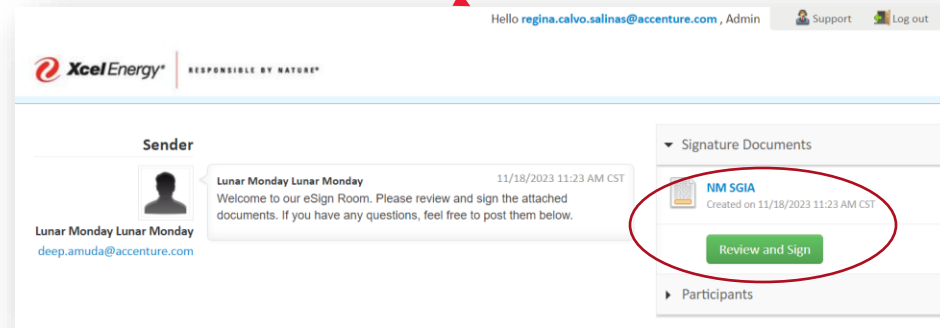
Action: SGIA

Check your email for the E-sign request & click the link to sign via Sertifi. *Note: the Application Agent will be cc-ed for visibility.



Click the link to access the SGIA Agreement.

Once in Sertifi, if you are the Customer, click the document to review & sign.



Track Type: Fast

Initiate Application

Action: Initiate Application eSign

- This action will only be required for Fast Track applications. See [NM Interconnection Rules](#) for more information.
- The customer will receive an email with a link to sign this agreement via Sertifi.
- Note: the Application Agent will be cc-ed on this eSignature email.

Initiate Application
Esign

Please check your email and sign all required eSignature documents to advance your application to the next step.

Action

An email has been sent to you and/or the interconnection customer with a link to e-sign documents. Please view the status table below.

Once all of the signatures have been collected, the action will be marked as "Draft" and the application will be able to advance to the next step.

Document Title	Activity	Signer	User
NM Initiate Application Form	Signature received	Customer	✉ regina.calvo.salinas@accenture.com
	Signer invited	Customer	✉ regina.calvo.salinas@accenture.com

Customer's email.



Work Request

Standard Interconnection Application

Applicant Signature

I hereby certify that, to the best of my knowledge, all the information provided in the Interconnection Application is true and correct. I also agree to install a Warning Label provided by (utility) on or near my service meter location. Generating systems must be compliant with IEEE, NEC, ANSI, and UL standards, where applicable. By signing below, the Applicant also certifies that the installed generating equipment meets the appropriate preceding requirement(s) and can supply documentation that confirms compliance.

Signature of Applicant: (Type Name)

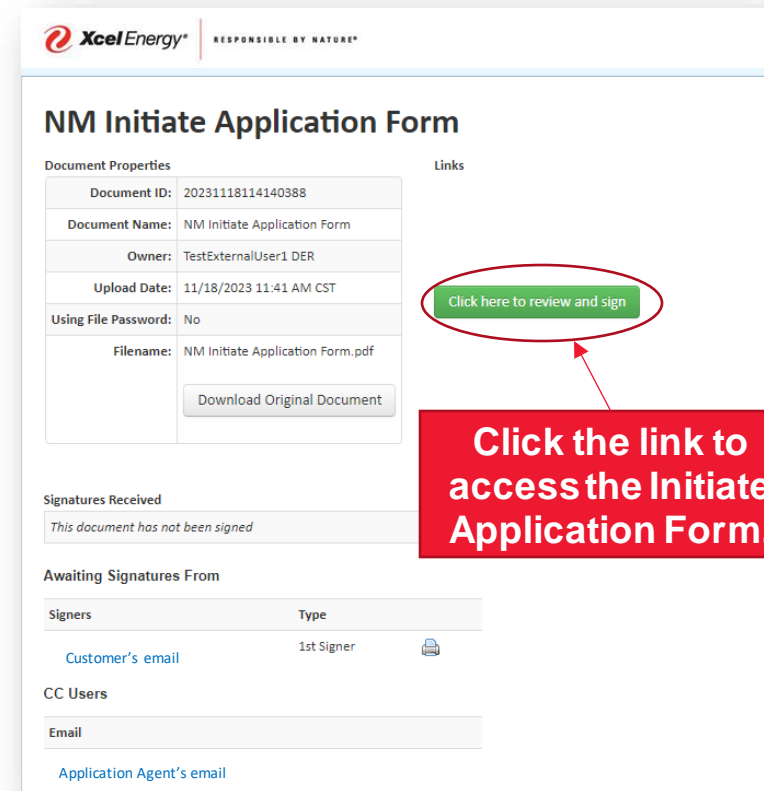
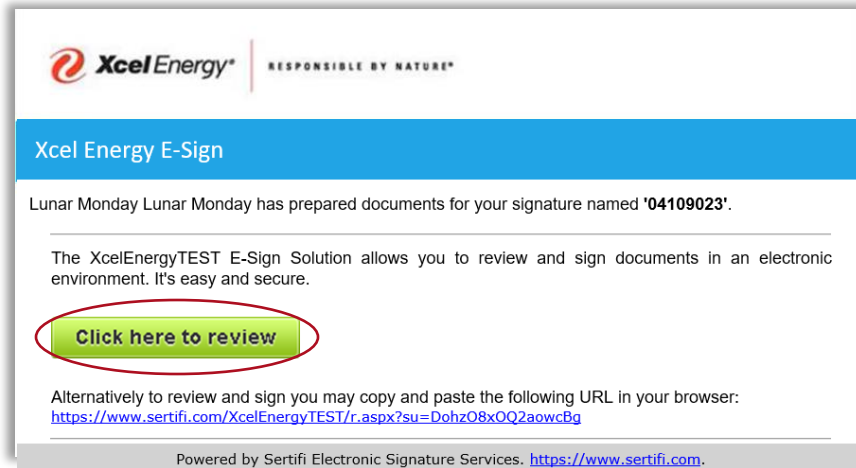
Date: 11/18/2023

Track Type: Fast

Initiate Application

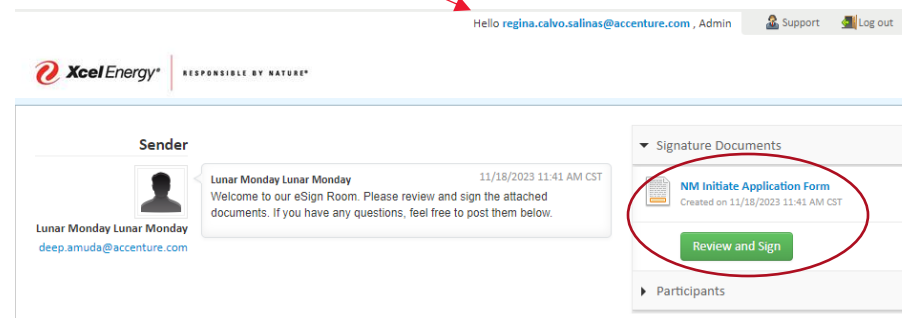
Action: Initiate Application eSign

Check your email for the E-sign request & click the link to sign via Sertifi. *Note: the Application Agent will be cc-ed for visibility.



Once in Sertifi, if you are the Customer, click the document to view & sign.

Click the link to access the Initiate Application Form.



Initiate Application

Step: Prepare Documents

- After clicking 'Save & Continue' in Initiate Application/E-signatures & Payments, you will be in the Prepare Documents step of the Initiate Application status. You will then be prompted to complete the following: Annotated Aerial Map, One-Line Diagram, Site Plan, Specification Sheet, and Protection & Control Schematics (if applicable)

After completing all actions, click "Submit"

Case #: 05368537
Status: Initiate Application
Step: Prepare Documents
Sub-Step:
App Owner: Your application is pending submission upon uploading the required engineering documents. You have 30 days to complete this step and can save your draft application at any time and return to it later. Please make sure to complete all application requirements prior to finalizing and submitting for review. For more information, visit: <https://nm.my.xcelenergy.com/s/renewable/developers/interconnection>

Submit

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Annotated Aerial Map	Enclose copy of any site documentation that indicates the precise physical location of the proposed Generating Facility (e.g., USGS topographic map or other diagram or documentation).	Open	Applicant	<input checked="" type="checkbox"/>	Action
One Line Diagram	Show the installation of the DER system and associated equipment required within your interconnection application.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Site Plan	Show the location plan identifying location of equipment noted on the one-line.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Specification Sheet(s)	Upload the specifications of your DER as well as other relevant interconnection equipment in your proposed system.	Open	Applicant	<input type="checkbox"/>	Action

For the following actions, you'll find slides with screenshots & helpful tips:

Annotated Aerial Map

Operation of Protections and Control Schemes

One Line Diagram

Manufacturer's Excitation and Ratio Correction Curves

Site Plan

Block Diagram

Proof of Site Control

Specification Sheet(s)

Fuse Curves

Initiate Application

Action: Annotated Aerial Map

To upload your documents, click "Action" to open a new tab.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Annotated Aerial Map	Enclose copy of any site documentation that indicates the precise physical location of the proposed Generating Facility (e.g., USGS topographic map or other diagram or documentation).	Open	Applicant	<input checked="" type="checkbox"/>	Action

Click "Upload Files" and submit.

Upload Annotated Aerial Map

Or drop files

Annotated Aerial Map 10/20/2023, 12:55 PM EDT

Note: This action will be required for both Simple and Fast Track applications.

Initiate Application

Action: One Line Diagram

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
One-Line Diagram	Show the installation of the DER system and associated equipment required within your interconnection application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

To upload your documents, click "Action" to open a new tab.

Enclose copy of site electrical one-line diagram showing the configuration of all Generating Facility equipment, Reference Point of Applicability, current and potential circuits, and protection and control schemes.

This one-line diagram must be signed and stamped by a licensed Professional Engineer if the Generating Facility is larger than 50 kW.

Upload One-Line Diagram

Or drop files

One Line Diagram 10/20/2023, 01:11 PM EDT

Click "Upload Files" and submit.

Note: This action will be required for both Simple and Fast Track applications.

Initiate Application

Action: Site Plan

To upload your documents, click "Action" to open a new tab.

Site Plan	Show the location plan identifying location of equipment noted on the one-line.	Open	Applicant	<input checked="" type="checkbox"/>	Action
-----------	---	------	-----------	-------------------------------------	--------

Click "Upload Files" and submit.

Upload Site Plan

Or drop files

Site Plan 10/20/2023, 01:01 PM EDT

Note: This action will be required for both Simple and Fast Track applications.

Initiate Application

Action: Proof of Site Control

To upload your documents, click “Action” to open a new tab.

Proof of Site Control Please provide Proof of Site Control. Open Applicant **Action**

Click “Upload Files” and submit.

17.9.568.13 APPLICATION REVIEW PROCESS: . (4)Site Control.

Documentation of site control must be submitted with the interconnection request. Site control may be demonstrated by: (1) Ownership of, or a leasehold interest in, or a right to develop a site for the purpose of constructing a generating facility; (2) An fully executed option to purchase or acquire a leasehold site for such purpose; or (3) An fully executed agreement demonstrating exclusivity or other business relationship between the interconnection applicant and the entity having the right authority to grant the applicant the right to possess or occupy a site for such purpose. [17.9.568.13 NMAC – Rp, 17.9.568.13 NMAC, xx/xx/2022]

Upload Proof of Site Control

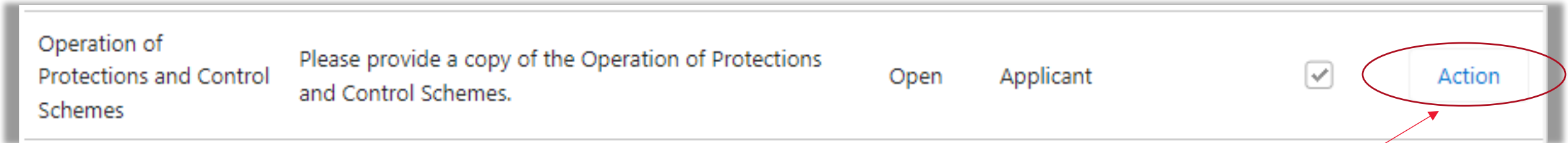
 Or drop files

Note: This action will be required only for Fast Track applications; this action is NOT required and will NOT be displayed for Simple Track applications.

Initiate Application

Action: Operation of Protections and Control Schemes

- This action will only be required for applications in which **Customer Owned Circuit Breaker = Yes** (as indicated in the Application Details Action).



Operation of Protections and Control Schemes

Please provide a copy of the Operation of Protections and Control Schemes.

Open Applicant

Action

Click "Upload Files" and submit.

To upload your documents, click "Action" to open a new tab.



Upload Operation of Protections and Control Schemes

Upload Files Or drop files

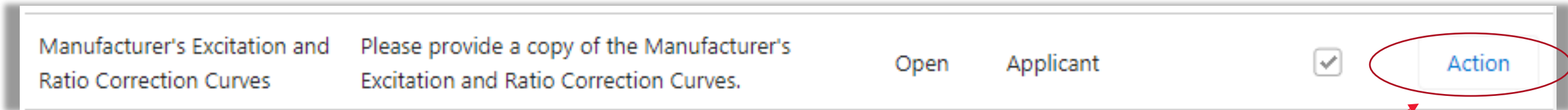
Submit

Note: This action will be required only for **Fast Track applications** if the condition above is **TRUE**; this action is **NOT** required and will **NOT** be displayed for Simple Track applications.

Initiate Application

Action: Manufacturer's Excitation and Ratio Correction Curves

- This action will only be required for applications in which **External Current or potential transformer used = Yes** (as indicated in the Application Details Action).



Click "Upload Files" and "Submit"

To upload your documents, click "Action" to open a new tab.



Note: This action will be required only for **Fast Track applications** if the condition above is **TRUE**; this action is NOT required and will NOT be displayed for Simple Track applications.

Note: This example shows specific requirements for a **Distributed Generation application**. Requirements for other programs will vary. **For more details/screenshots for Solar*Rewards Community, please see the Appendix.**

Initiate Application

Action: Block Diagram

- This action will only be required for applications in which **DER Generator Type = Synchronous** (as indicated in the System Details Action).

Block Diagram

Please provide an IEEE model block diagram of excitation system, governor system and power system stabilizer (PSS) in accordance with the regional reliability council criteria. A copy of the manufacturer's block diagram may not be substituted.

Open Applicant **Action**

Click "Upload Files" and submit.

To upload your documents, click "Action" to open a new tab.

Upload Block Diagram

Or drop files

Note: This action will be required only for Fast Track applications if the condition above is **TRUE**; this action is NOT required and will NOT be displayed for Simple Track applications.

Note: This example shows specific requirements for a Distributed Generation application. Requirements for other programs will vary. For more details/screenshots for Solar*Rewards Community, please see the Appendix.

Initiate Application

Action: Specification Sheet(s)

- This action will only be required for **Battery** applications that have an **AC Active Power Nameplate Rating > 1,000 kW (1 MW)**.

Specification Sheet(s) Upload the specifications of your DER as well as other relevant interconnection equipment in your proposed system. Open Applicant **Action**

Click "Upload Files" and submit.

To upload your documents, click "Action" to open a new tab.

Upload Specification Sheet(s)
 Or drop files

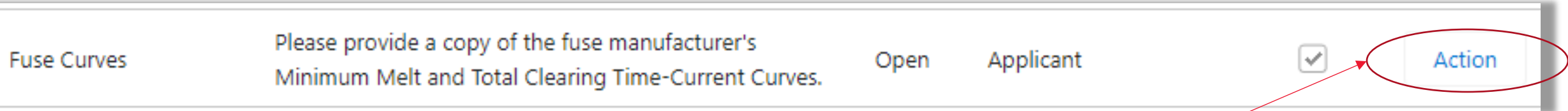
Note: This action will be required only for **Fast Track applications** if the condition above is **TRUE**; this action is NOT required and will NOT be displayed for Simple Track applications.

Note: This example shows specific requirements for a **Distributed Generation application**. Requirements for other programs will vary. For more details/screenshots for **Solar*Rewards Community**, please see the **Appendix**.

Initiate Application

Action: Fuse Curves

- This action will only be required for applications in which **Customer Owned Fuse = Yes** (as indicated in the Application Details Action).



Click "Upload Files" and submit.

To upload your documents, click "Action" to open a new tab.



Note: This action will be required only for Fast Track applications if the condition above is **TRUE**; this action is NOT required and will NOT be displayed for Simple Track applications.

Initiate Application

Step: In Review (PMO)

- After clicking “Submit” in Initiate Application/Prepare Documents, you will be in the In Review (PMO) step of the Initiate Application status. Xcel Energy now has 10 business days to review your application. There is no action for you here, as Xcel will review your application and pass it into the next step. If you are missing anything, Xcel Energy will notify you.

Case #: 05368541

Status: Initiate Application

Step: Prepare Documents

Sub-Step:

App Owner: Your application is pending submission upon uploading the required engineering documents. You have 30 days to complete this step and can save your draft application at any time and return to it later. Please make sure to complete all application requirements prior to finalizing and submitting for review. For more information, visit: <https://nm.my.xcelenergy.com/s/renewable/developers/interconnection>

Submit

Case #: 05368537

Status: Initiate Application

Step: In Review (PMO)

Sub-Step:

App Owner: Your application is being reviewed for completeness. If anything is missing, Xcel Energy will notify you within 10 business days. Xcel Energy: Perform Completeness Review.

Initiate Application

Step: On Hold, Sub-Step: Provide Missing Information (Engineering)

- If Xcel has reopened actions for the applicant to resubmit, the application will be on hold until the applicant provides the missing information

Case #: 05368541
 Status: Initiate Application
 Step: On Hold
 Sub-Step: Provide Missing Information (Engineering)
 App Owner: Your application is missing required materials/details. Please address the engineering comments and re-submit for review within 10 business days.

Submit

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
120% Rule Support Documentation	120% Rule Failed. Please provide the appropriate support documentation based on the failure type (viewable in the Applications Details tab).	Open	Applicant	<input checked="" type="checkbox"/>	Action
Annotated Aerial Map	Enclose copy of any site documentation that indicates the precise physical location of the proposed Generating Facility (e.g., USGS topographic map or other diagram or documentation).	Open	Applicant	<input checked="" type="checkbox"/>	Action

- The applicant will redo all actions that have been reopened and click “Submit” so Xcel may review the revised documentation.

Initiate Application

Step: On Hold, Sub-Step: Provide Missing Information (Engineering)

- The applicant will have 10 business days to provide the missing information.

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
Interconnection Application Timeline	You have 12 months to complete your application. If an extension is required, reach out to Xcel Energy using the Chatter feature.	Applicant	11/15/2023, 01:00 AM CST	11/13/2024, 05:30 PM CST
Provide Missing Information - Engineering	App Owner: Please provide missing application information identified by Xcel Energy within 10 business days.	Applicant	11/15/2023, 01:00 AM CST	11/28/2023, 05:30 PM CST

Initiate Application

Step: Completeness Review (Eng), Sub-Step: Review Missing Information (Engineering)

- After submitting the reopened actions, Xcel will have 7 business days to re-review and perform the Completeness Review

Case #: 05368541

Status: Initiate Application

Step: Completeness Review (Eng)

Sub-Step: Review Missing Information (Engineering)

App Owner: Your application is being re-reviewed for completeness. If anything is missing, Xcel Energy will notify you within 7 business days. Xcel Energy: Perform Completeness Review.

Initiate Application

Step: Completeness Review

- The Xcel Energy team has a total of 10 business days to review your application for completeness.
- Once your application is “deemed complete”, Xcel Energy will change the status of your application. The “Initiate Application” Chevron on the tracker will turn red to indicate that the application is no longer in that status.

Case #: 05368537

Status: Initiate Application

Step: Complete

Sub-Step:

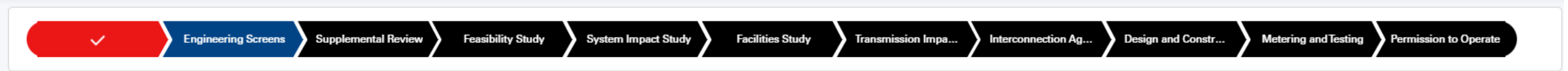
App Owner: Your application has passed the Completeness Review and has been assigned its position in the engineering interconnection queue based on the deemed complete date. Your application will now enter engineering screens.



Engineering Screens

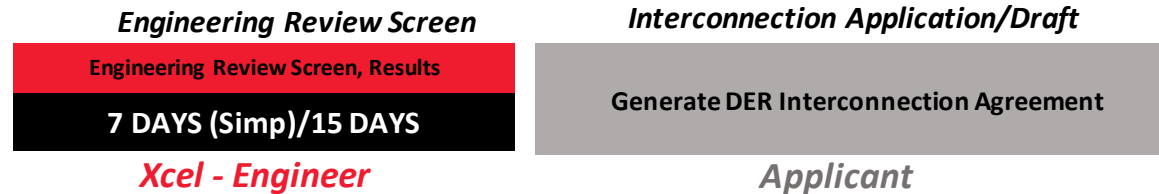
Engineering Screens

Process Flow



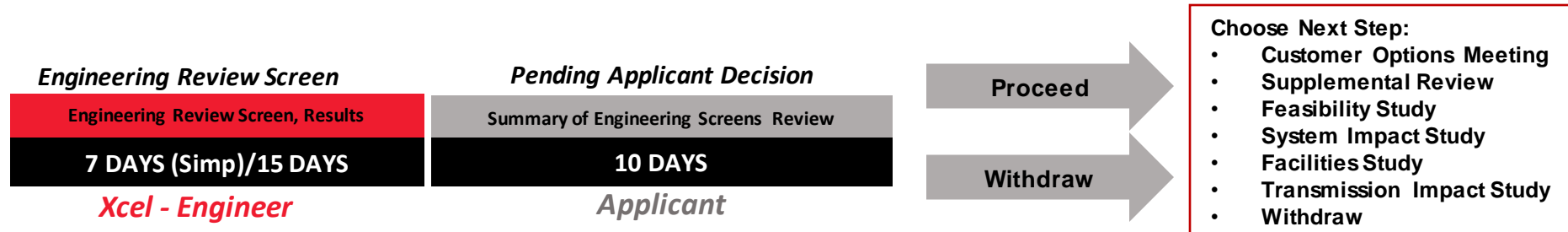
What are Engineering Screens?

- A review by the electric provider of the completed standard interconnection application form for interconnection, to determine if a supplemental review or system impact study is needed. See [NM Interconnection Rules](#) for more information.



Note: Applications will only generate an Interconnection Agreement if they are Fast Track or Detailed Study; a Simple Track application will trigger the Design and Construction/Documents Pending StatusStepSubStep after a passed Engineering Screen.

- If your application is deemed “Safe and Reliable for Interconnection”, the status will move to Interconnection Agreement status.



- If your application requires further review, the step will move to Pending Applicant Decision. You will be asked whether you would like to proceed or withdraw your application.

Engineering Screens

Step: Pending Applicant Decision

- After the Xcel Engineer completes the Engineers Screens, if your application requires further review, the step will move to Pending Applicant Decision.
- During this step, you will be asked whether you would like to proceed or withdraw your application.

Case #: 05368542
Status: Engineering Screens
Step: Pending Applicant Decision
Sub-Step: Summary of Engineering Screens Review
App Owner: Please make a decision on how to proceed with your application based on Engineering Screens results within 10 Business Days.

Submit

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
Interconnection Application Timeline	You have 12 months to complete your application. If an extension is required, reach out to Xcel Energy using the Chatter feature.	Applicant	11/15/2023, 01:00 AM CST	11/13/2024, 05:30 PM CST
Engineering Screens Pending Applicant Decision	Please make a decision on how to proceed with your application based on Engineering Screens results within 10 Business Days.	Applicant	11/15/2023, 01:00 AM CST	11/28/2023, 05:30 PM CST

Engineering Screens

Action: Summary of Engineering Screens Review

To complete the action, click "Action".

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Summary of Engineering Screens Review	See the Results of your Engineering Screen Review summary. To view the screen results in full, view within the "Finalized Actions" tab.	Open	Applicant	<input checked="" type="checkbox"/>	Action

See next slide to see tips on accessing "Finalized Actions" tab

Engineering Screen Review

Engineering Screen is complete. Please review a summary of the results below and decide on next steps.

Engineering Screen Results: Fail
Engineering Screen Detailed Result: Further Study Needed

TEst

Next Step Options

Supplemental Review
Supplemental Review is needed if an interconnection application fails the Engineering Review Screen and Xcel Energy is unable to determine whether the project is safe to interconnect without further engineering analysis. Supplemental Review, while not as detailed as a System Impact Study, does provide more insight into key areas of concern. To accept the offer of a Supplemental Review, the interconnection customer must agree in writing and submit a deposit for the estimated costs within 15 business days of the offer. Within 20 business days following receipt of the deposit for a Supplemental Review, Xcel Energy will perform a Supplemental Review of the proposed interconnection resource using the screens set forth in Section 17.9.568.17 of the New Mexico Rules Regulating Electric Utilities.

Withdraw
Withdrawing your application removes your project from the interconnection process. Withdrawal is not reversible. If an applicant later desires to be considered again for interconnection, a new application and applicable fee must be submitted.

Choose Your Next Step

- Customer Options Meeting
- Choose One**
- Facilities Study
- Customer Options Meeting
- Withdraw

Finalize

Engineering Screens

Step: Pending Applicant Decision

- To view the Engineering Screens results, navigate to the “Finalized Actions” tab and click the Engineering Review Screen action “Action” button.
- Click the hyperlinked document of the action screen to download and view the results.

Actions **Finalized Actions** Milestones Completed Milestones Application Details

Engineering Review
Screen

Upload Engineering Review Screen Results.

Finalized Xcel Energy

Action

Upload Engineering Review Screen

Upload Files Or drop files

Engineering Review Screen Results - Test File

11/15/2023, 10:37 PM EST

Click 'Action'.

Click to download
and view results

Engineering Screens

Step: Customer Options Meeting, Sub-Step: Pending

- If your application requires further review, you can opt in and schedule a Customer Options Meeting with Xcel.
- You have 10 days to schedule a Customer Options Meeting.

Case #: 05368539
Status: Engineering Screens
Step: Customer Options Meeting
Sub-Step: Pending
App Owner: Your application requires further study or minor modifications and is pending your decision to schedule or forego a customer options meeting. (A customer options meeting can only be omitted if there is mutual agreement between both parties.) Please reach out to the program, using the Chatter feature, to schedule a Customer Options Meeting. Please only click Submit to push the application forward after the customer options meeting has been scheduled or waived.

Submit

After the Customer Options Meeting has been scheduled, click "Submit"

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
Interconnection Application Timeline	You have 12 months to complete your application. If an extension is required, reach out to Xcel Energy using the Chatter feature.	Applicant	11/15/2023, 01:00 AM CST	11/13/2024, 05:30 PM CST
Schedule a Customer Options Meeting (optional)	App Owner: You can choose to schedule a Customer Options Meeting or agree to omit and move on to the next step within 10 business days.	Applicant	11/15/2023, 01:00 AM CST	11/28/2023, 05:30 PM CST

Create A New Post

* Topic
Customer Options Meeting/Scoping Meeting

* Question
Sample Question

Include attachment?

Next

Use Chatter to schedule a Customer Options Meeting

Engineering Screens

Step: Customer Options Meeting, Sub-Step: Complete

- Xcel Energy will determine the next step for the application after the Customer Options Meeting has completed.

Case #: 05368539

Status: Engineering Screens

Step: Customer Options Meeting

Sub-Step: Complete

App Owner: Your application is pending a decision on how to proceed after the Customer Options Meeting.

(Supplemental Review, System Impact Study, Feasibility Study, Facilities Study, Transmission Impact Study, or Withdraw).

Supplemental Review

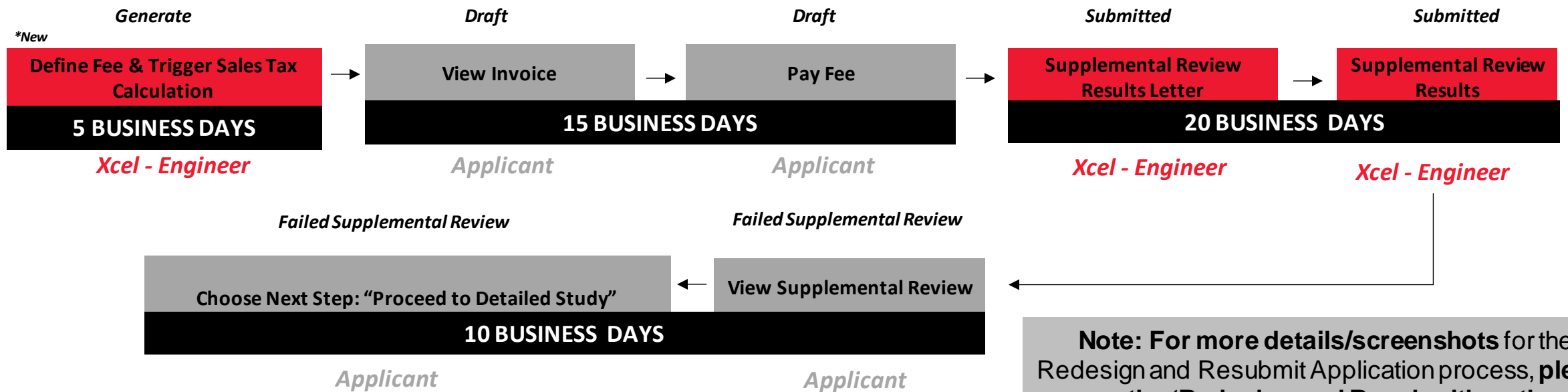
Supplemental Review

Process Flow



What is a Supplemental Review?

- This is an additional engineering evaluation conducted by the electric provider of the completed standard interconnection application form for interconnection, to determine if a generating facility can be interconnected following the (simplified or fast track) process without the need for detailed study. See [NM Interconnection Rules](#) for more information.

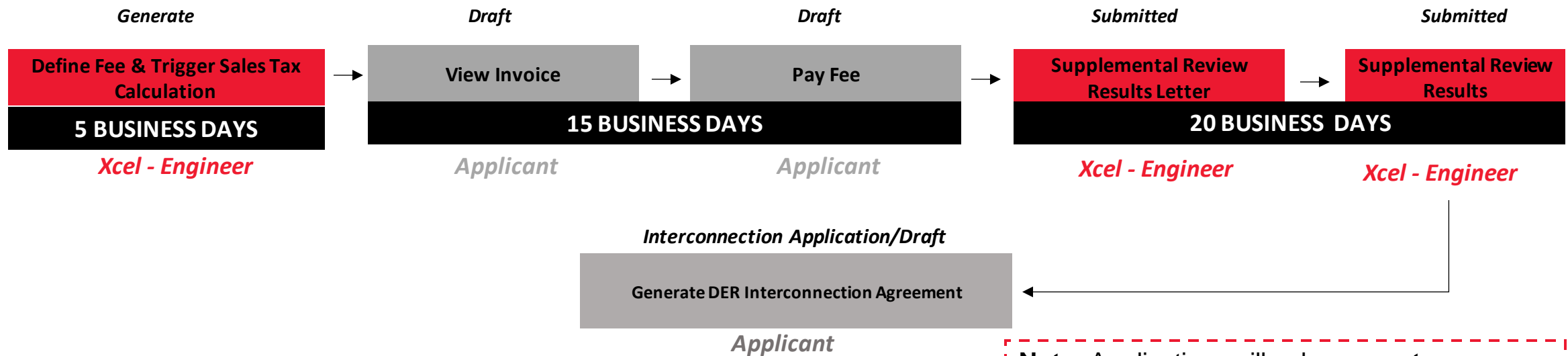


Note: For more details/screenshots for the Redesign and Resubmit Application process, please see the 'Redesign and Resubmit' section.

Supplemental Review

Passed Supplemental Review

- This is an additional engineering evaluation conducted by the electric provider of the completed standard interconnection application form for interconnection, to determine if a generating facility can be interconnected following the (simplified or fast track) process without the need for detailed study. See [NM Interconnection Rules](#) for more information.
- If your application is deemed “Safe and Reliable for Interconnection”, the status will move to Interconnection Agreement status.



Note: Applications will only generate an Interconnection Agreement if they are Fast Track or Detailed Study; a Simple Track application will trigger the Design and Construction Status and the Documents Pending Step after a passed Supplemental Review.

Supplemental Review

Step: Draft

- After Xcel Energy generates the invoice for your Supplemental Review, you will be able to view it.
- During the Draft step, you will be directed to review the invoice and pay the Supplemental Review Fee through Wells Fargo.

Case #: 05368515
Status: Supplemental Review
Step: Draft
Sub-Step:
App Owner: Please review the invoice for the Supplemental Review and submit the Supplemental Review deposit within 15 business days.

Submit

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Supplemental Review Fee	Please pay the Supplemental Review Fee through online payment to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Supplemental Review Invoice	View Invoice for upcoming Supplemental Review.	Open	Applicant	<input type="checkbox"/>	Action

After completing all actions, click "Submit"

Actions Finalized Actions Milestones Completed Milestones Application Details

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
Supplemental Review Invoice and Pay Fee	Review the invoice for the Supplemental Review and electronically pay Supplemental Review Fee within 15 business days.	Applicant	11/15/2023, 02:00 AM EST	12/5/2023, 06:30 PM EST

For each of these actions, you'll find slides with screenshots & helpful tips:

Supplemental Review Fee → Supplemental Review Invoice

Supplemental Review

Action: Supplemental Review Invoice

- After Xcel has generated the invoice for your upcoming Supplemental Review, you can view it.

Supplemental Review Invoice

By paying this Supplemental Review Fee the applicant is agreeing in writing to proceed with a Supplemental Review Study within 15 business days of the offer.

Supplemental Review Invoice Date
2023-10-16

Supplemental Review Fee
2500

Supplemental Review Sales Tax
121.88

Supplemental Review Total Amount
2621.88

Please remit payment via ACH to:

Southwestern Public Service TIN 75-0575400
Wells Fargo Bank, N.A. ACH ABA # 091000019
San Francisco, CA Wire ABA # 121000248
SWIFT Code WFBUS6S Acct # 2391424617

The fee outlined above is to pursue the additional engineering labor required for the evaluation of a Minimum Gross Load Screen, a Voltage and Power Quality Screen, and a Safety and Reliability Screen (see section 17.9.568 NMAC). These costs are in addition to the application fee already received. Additional studies, should they be needed, will be invoiced accordingly. We expect to complete this study within 20 business days.

[Close](#)

Supplemental Review

Action: Supplemental Review Fee

- After reviewing the invoice, you will be directed to pay the Supplemental Review Fee through Wells Fargo.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Supplemental Review Fee	Please pay the Supplemental Review Fee through online payment to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Helpful Tips:

- Click the "action" button to pay the Supplemental Review Fee
- Enter required information until you reach the final page, ensure you click "submit."

Supplemental Review

Action: Supplemental Review Fee

Take note of the computer generated "Primary Authorization Code" and "Secondary Authorization Code".

Please see directions below for online payment. If preferred, fee(s) can always be paid traditionally via check/wire and form.

- Fee invoice(s) are available now on the Wells Fargo payment site.
- The invoice(s) are ready for online payment.
- Payments will post to the applicable application ID the day after payment is made to Wells Fargo (another 24 hours).
- Please enter Primary Authorization Code **SR-10937239** and Secondary Authorization Code **321111** to complete online payment with Wells Fargo.
- Primary and Secondary codes are unique to your account. Once an account is set-up, you can use the same codes for each application as needed.
- Credit card payment will not be accepted.

Payment Details:

Item Description	Invoice Number	Fee Amount Due	Sales Tax Amount Due	Total Amount Due	Due Date	Payment Status
Supplemental Review Fee	05368276-PN-0035539	\$2,500.00	\$176.56	\$2,676.56	Dec 5, 2023	Not Paid

Please click the 'Pay Fee Online' button for online payment.

Pay Fee Online

Click "Pay Fee Online". You will be redirected to Wells Fargo to submit payment.

Supplemental Review

Action: Supplemental Review Fee

Wells Fargo payment steps (one-time payment):

- Open "make payment" tab
- Use Primary and Secondary authorization codes
- Authorization codes located within Fee Action

Wells Fargo payment steps (registered):

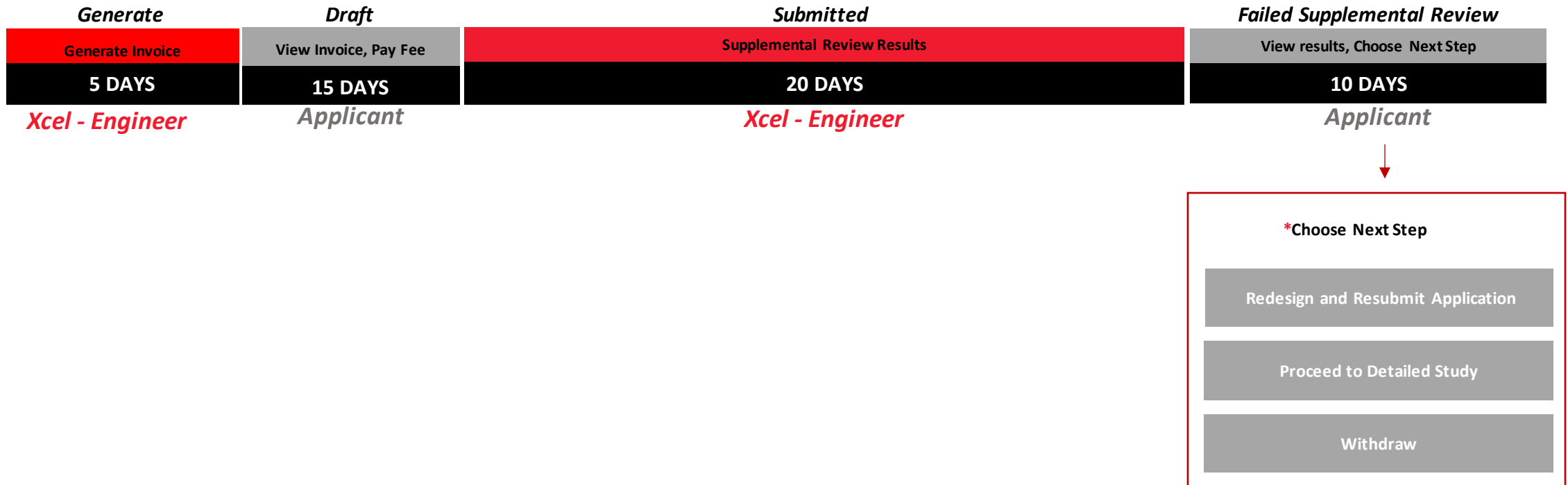
- Use your login credentials to login into your account
- Your Wells Fargo credentials will differ from your DER portal credentials
- Your invoice will appear in the top right corner

The screenshot shows the Wells Fargo login interface. At the top, there are two tabs: "LOGIN" and "MAKE PAYMENT". Below the "LOGIN" tab, there is a red-bordered box labeled "Registered Users". Below the "MAKE PAYMENT" tab, there is a red-bordered box labeled "One-Time Payments". The login form includes a "Login ID" field, a "Password" field, and a green "Login" button. There are also links for "Forgot your Login ID?" and "Password Help?".

Supplemental Review

Step: Failed Supplemental Review

- If an Engineer determines that further study is needed, the applicant will be directed to the Failed Supplemental Review step. The applicant will be able to choose the next steps.



Note: For more details/screenshots on the options the decisions the applicant can make for each scenario, please see the next section.

Supplemental Review

Step: Failed Supplemental Review

- If an Engineer determines that further study is needed, you will be directed to the Failed Supplemental Review step. You will be able to choose the next steps.

Case #: 05368515
Status: Supplemental Review
Step: Failed Supplemental Review
Sub-Step:
App Owner: Please indicate how you would like to proceed with your application within 10 business days.

Submit

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
View Supplemental Review	View the results of your Supplemental Review.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Helpful Tips:

- Click the "Action" button to view the results of your Supplemental Review

Supplemental Review

Step: Failed Supplemental Review

- Once the Supplemental Review results have been downloaded and reviewed, the Choose Next Step action will be displayed.
- You will be able to choose if you'd like to proceed to the detailed study, redesign and resubmit your application or withdraw your application.

To Choose Next Step, click "Action".

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Choose Next Step	Based on the results of your Supplemental Review, please choose how you would like to proceed with your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action
View Supplemental Review	View the results of your Supplemental Review.	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Supplemental Review

Action: Choose Next Step

- Once the Supplemental Review results have been downloaded and reviewed, the Choose Next Step action will be displayed.
- You will be able to choose if you'd like to proceed to the detailed study, redesign and resubmit your application or withdraw your application.

Passed the Supplemental Review?

No

Supplemental Review Comments

Sample Supplemental Review Comments

*Choose Next Step

--None--

--None--

Redesign and Resubmit Interconnection Application

Proceed to Detailed Study

Withdraw

Submit

Note: If you decide to “Proceed to Detailed Study”, your application will automatically advance to the required study (Feasibility, Facilities, System Impact, Transmission Impact) selected by Xcel. Please review slides in each study’s respective section for step-by-step guidance.

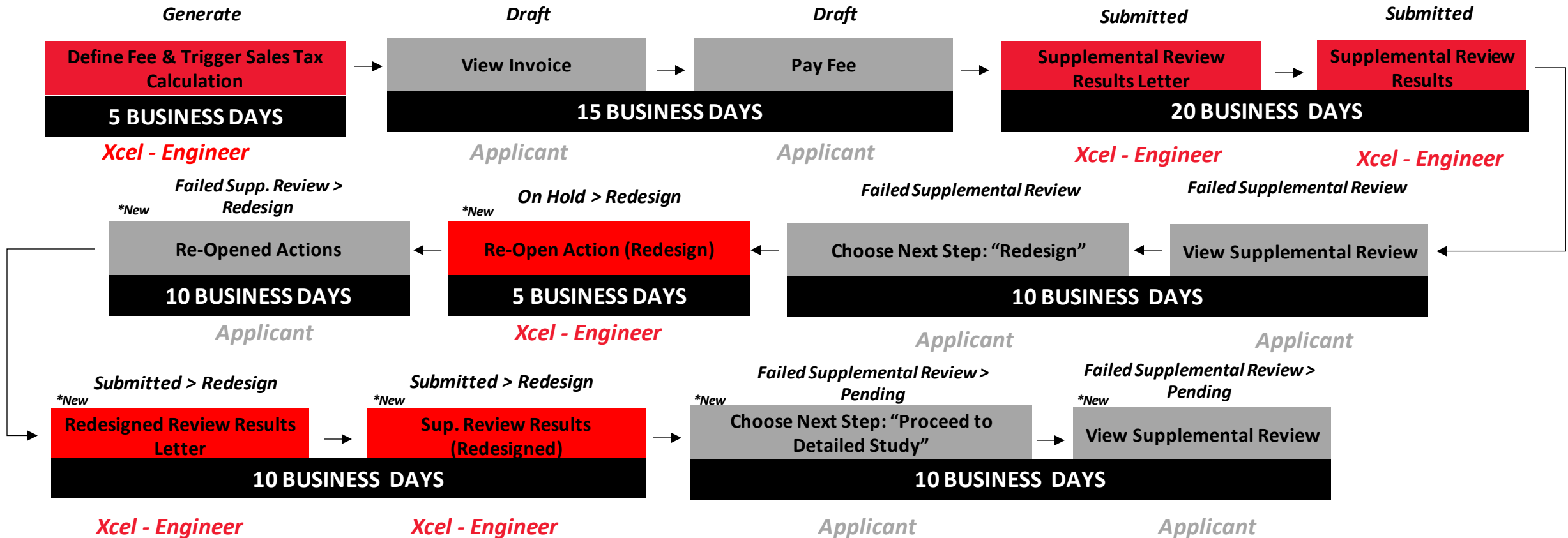
For each of these next steps, you’ll find slides with screenshots & helpful tips:

Redesign and
Resubmit IA

Supplemental Review

Process Flow – Redesign and Resubmit Application

- The Redesign Application option must be offered once after a failed Supplemental Review.



Supplemental Review

Step: Failed Supplemental Review, Sub-Step, Redesign and Resubmit Application

- If you select “Redesign and Resubmit Interconnection Application”, you can provide additional information for Xcel to review. Xcel Engineer will select the relevant actions to be reopened for the resubmission.
- Once the Engineer reopens the relevant actions, those actions will become available for the applicant to update

Case #: 05368515
Status: Supplemental Review
Step: Failed Supplemental Review
Sub-Step: Redesign and Resubmit Application
App Owner: To complete your Redesign and Resubmit application process, please provide the application information identified by Xcel Energy within 10 business days. If applicable, for actions where the upload of updated documentation is requested, please name the document "Redesigned and Resubmitted Application."

Please include in the test file name a mention of "Redesigned and Resubmitted Application."

Submit

Complete all reopened actions and click "Submit."

ACTION NAME	DESCRIPTION	REQUIRED?	ACTION
Site Map	Please provide a site map that includes true north, proposed project location (including general area of project), GPS Coordinates, proposed service point location, and major roads, streets and/or highways.	Open	Applicant <input checked="" type="checkbox"/> Action

Supplemental Review

Step: Failed Supplemental Review, Sub-Step: Pending

- If an Engineer determines a further study is still needed after resubmission, Applicant can view those results and choose the next step.

Case #: 05368515
Status: Supplemental Review
Step: Failed Supplemental Review
Sub-Step: Pending
App Owner: Please indicate how you would like to proceed with your application within 10 business days.

Submit

Actions	Finalized Actions	Milestones	Completed Milestones	Application Details
		Failed Supplemental Review Decision	Please indicate how you would like to proceed with your application within 10 business days.	Applicant 11/15/2023, 02:00 AM EST 11/28/2023, 06:30 PM EST

Supplemental Review

Action: View Supplemental Review Redesigned and Resubmitted Application

- If an Engineer determines a further study is still needed after resubmission, Applicant can view those results and choose the next step.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
View Supplemental Review Redesigned and Resubmitted Application	View the results of your Supplemental Review.	Open	Applicant	<input checked="" type="checkbox"/>	Action

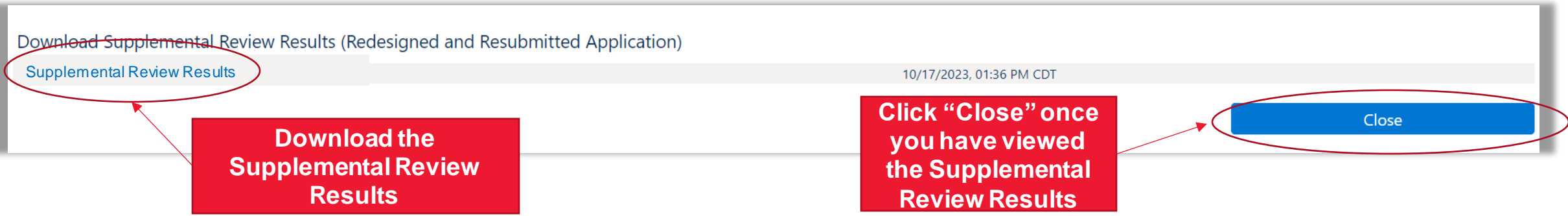
Download Supplemental Review Results (Redesigned and Resubmitted Application)

[Supplemental Review Results](#) 10/17/2023, 01:36 PM CDT

Download the Supplemental Review Results

Click "Close" once you have viewed the Supplemental Review Results

[Close](#)



Supplemental Review

Action: Choose Next Step Redesigned and Resubmitted Application

- If an Engineer determines a further study is still needed after resubmission, Applicant can view those results and choose the next step.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Choose Next Step Redesigned and Resubmitted Application	Based on the results of your Supplemental Review, please choose how you would like to proceed with your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action
View Supplemental Review Redesigned and Resubmitted Application	View the results of your Supplemental Review.	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Passed the Supplemental Review?

Supplemental Review Comments

* Choose Next Step

--None--
--None--
Proceed to Detailed Study
Withdraw

Once you've completed the necessary fields, click "Submit".

Once resubmitted once, the Applicant can only choose to proceed to the detailed study specified by the Engineer or withdraw their application

Scoping Meeting

Detailed Study – Scoping Meeting

Step: Scoping Meeting, Sub-Step, Pending

- Prior to starting any Detailed Study (Supplemental Review, Feasibility Study, Transmission Impact Study, Facilities Study), the Applicant may choose to schedule or waive a scoping meeting. See [NM Interconnection Rules](#) for more information.

Case #: 05368515
 Status: Feasibility Study
 Step: Scoping Meeting
 Sub-Step: Pending

App Owner: You can choose to schedule a scoping meeting or agree to omit and move on to the next step within 10 business days after Interconnection request completion.

Submit

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Scoping Meeting Decision (Feasibility Study)	Would you like to proceed with a scoping meeting or go straight to the study invoice?	Open	Applicant	<input checked="" type="checkbox"/>	Action

Actions Finalized Actions Milestones Completed Milestones Application Details

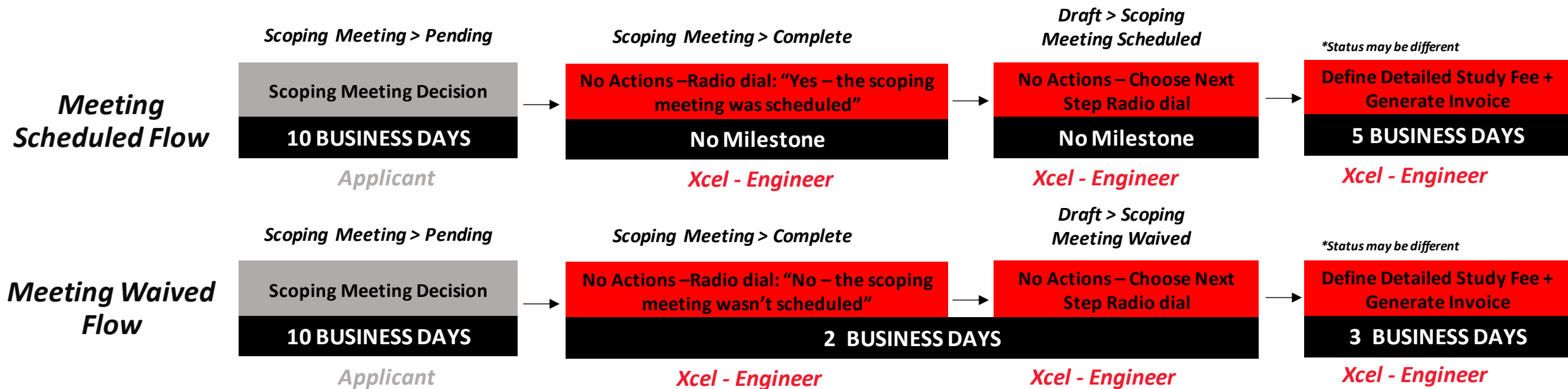
Schedule a Scoping Meeting (Optional) - Feasibility Study	You can choose to schedule a scoping meeting or agree to omit and move on to the next step within 10 business days.	Applicant	11/15/2023, 01:00 AM CST	11/28/2023, 05:30 P
---	---	-----------	--------------------------	---------------------

The Applicant has 10 business days to choose to schedule or waive a Scoping Meeting.

Detailed Study – Scoping Meeting

Process Flow

- Prior to starting any Detailed Study (Feasibility Study, Transmission Impact Study, Facilities Study), the Applicant may choose to schedule or waive a scoping meeting.
- The below milestone requirements allows Xcel Energy to ensure that there is not risk to be uncompliant with the 5 days milestone defined in the [NM Interconnection Rule](#) in the case that the application sits for any given period in the Detailed Study > Scoping Meeting > Complete SSS.



Detailed Study – Scoping Meeting

Example of Application with 2+ Detailed Studies

- By mutual agreement of the parties, the scoping meeting, prior to each detailed study be conducted, may be scheduled or waived.
- The example below shows an application that requires a System Impact Study and a Facilities Study.



Detailed Study – Scoping Meeting

Step: Scoping Meeting, Sub-Step, Pending

- Prior to starting any Detailed Study (Feasibility Study, Transmission Impact Study, Facilities Study), the Applicant may choose to schedule or waive a scoping meeting. See [NM Interconnection Rules](#) for more information.

Case #: 05368515
 Status: Feasibility Study
 Step: Scoping Meeting
 Sub-Step: Pending

App Owner: You can choose to schedule a scoping meeting or agree to omit and move on to the next step within 10 business days after Interconnection request completion.

Submit

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Scoping Meeting Decision (Feasibility Study)	Would you like to proceed with a scoping meeting or go straight to the study invoice?	Open	Applicant	<input checked="" type="checkbox"/>	Action

Actions Finalized Actions Milestones Completed Milestones Application Details

Schedule a Scoping Meeting (Optional) - Feasibility Study	You can choose to schedule a scoping meeting or agree to omit and move on to the next step within 10 business days.	Applicant	11/15/2023, 01:00 AM CST	11/28/2023, 05:30 P
---	---	-----------	--------------------------	---------------------

The Applicant has 10 business days to choose to schedule or waive a Scoping Meeting.

Detailed Study – Scoping Meeting

Action: Scoping Meeting Decision

- Prior to starting a Detailed Study, the Applicant may choose to schedule or waive a scoping meeting.
- To schedule the scoping meeting, use the Chatter feature.

Would you like to schedule or waive the scoping meeting?

You can find more information on scoping meetings: [17.9.568 NMAC - INTERCONNECTION OF GENERATING FACILITIES WITH A RATED CAPACITY UP TO AND INCLUDING 10 MW CONNECTING TO A UTILITY SYSTEM Section 17.9.568.18 - B. Scoping Meeting](#)

* Decision

--None--

--None--

Waive Scoping Meeting

Schedule Scoping Meeting

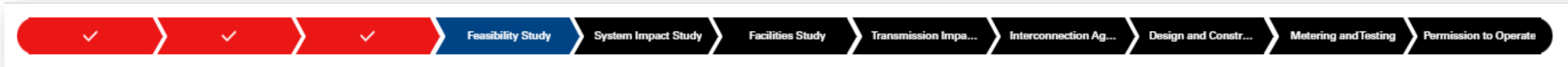
Finalize

Once you've selected
your decision, click
"Finalize"

Feasibility Study

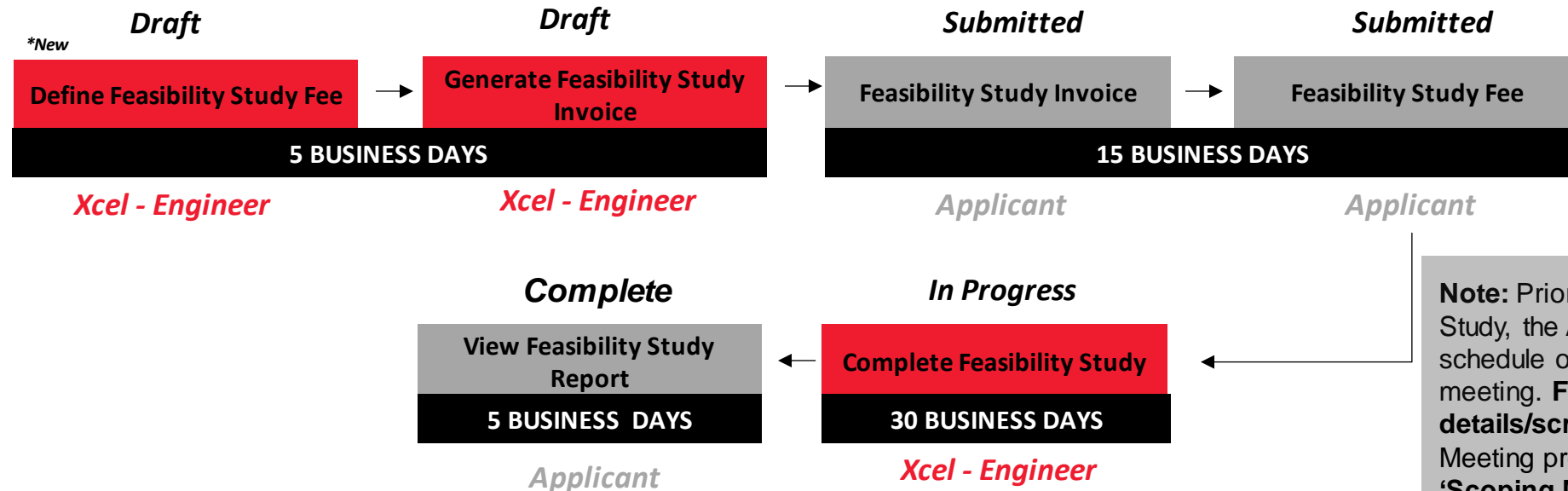
Feasibility Study

Process Flow



What is a Feasibility Study?

- This is a review conducted to identify any potential adverse system impacts that would result from interconnection of the generating facility. If the application is deemed “Safe and Reliable for Interconnection”, the status will move to Interconnection Application. If the application requires further review, the step will move to Engineer selected next step. See [NM Interconnection Rules](#) for more information.



Note: Prior to starting any Detailed Study, the Applicant may choose to schedule or waive a scoping meeting. **For more details/screenshots** on the Scoping Meeting process, **please see the ‘Scoping Meeting’ section.**

Feasibility Study

Step: Submitted

- After Xcel has generated the invoice for your upcoming Feasibility Study, you can view it and pay the fee.
- During the Submitted step, you will be directed to review the invoice and pay the Feasibility Study Fee through Wells Fargo.

Case #: 05368515
Status: Feasibility Study
Step: Submitted
Sub-Step:
App Owner: Xcel Energy has indicated your application needs a Feasibility Study. View Invoice and pay the fee within 15 business days.

[Submit](#)

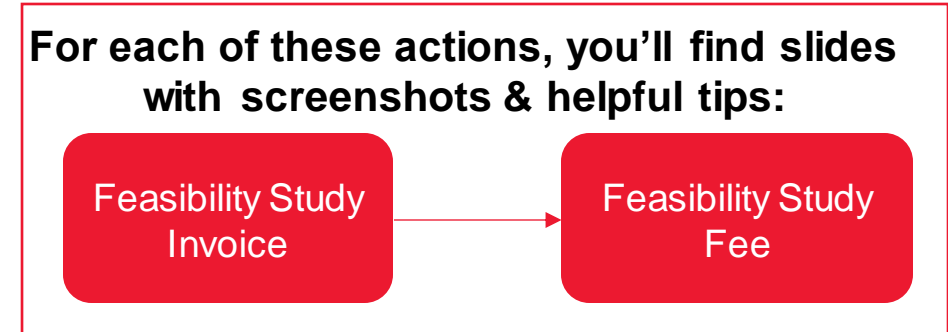
Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Feasibility Study Fee	Pay Feasibility Study Fee through online payment to advance your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Feasibility Study Invoice	View your Feasibility Study Invoice	Open	Applicant	<input checked="" type="checkbox"/>	Action

After completing all actions, click "Submit"

Actions Finalized Actions Milestones Completed Milestones Application Details

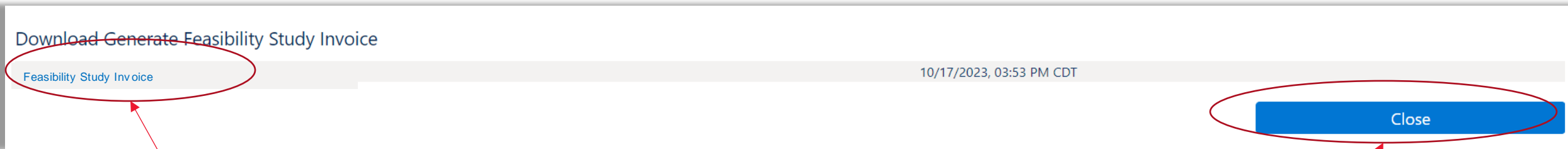
Feasibility Study Review Invoice and Pay Fee	Review the invoice for the Feasibility Study and electronically pay Feasibility Study Fee within 15 business days.	Applicant	11/15/2023, 01:00 AM CST	11/14/2023, 05:08 P
--	--	-----------	--------------------------	---------------------



Feasibility Study

Action: Feasibility Study Invoice

- After Xcel has generated the invoice for your upcoming Feasibility Study, you can view it.
- In order to access the invoice, click on the document name and download the document.



Download the Feasibility Study Invoice

Click "Close" once you have viewed the Feasibility Study Invoice

Feasibility Study

Action: Feasibility Study Fee

- After reviewing the invoice, you will be directed to pay the Feasibility Study Fee through Wells Fargo.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Feasibility Study Fee	Pay Feasibility Study Fee through online payment to advance your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Helpful Tips:

- Click the "Action" button to pay the Feasibility Study fee.
- You will have 15 business days to pay the Feasibility Study Fee.

Feasibility Study

Action: Feasibility Study Fee

Please see directions below for online payment. If preferred, fee(s) can always be paid traditionally via check/wire and form.

- Fee invoice(s) are available now on the Wells Fargo payment site.
- The invoice(s) are ready for online payment.
- Payments will post to the applicable application ID the day after payment is made to Wells Fargo (another 24 hours).
- Please enter Primary Authorization Code **SR-10937239** and Secondary Authorization Code **321111** to complete online payment with Wells Fargo.
- Primary and Secondary codes are unique to your account. Once an account is set-up, you can use the same codes for each application as needed.
- Credit card payment will not be accepted.

Payment Details:

Item Description	Invoice Number	Fee Amount Due	Sales Tax Amount Due	Total Amount Due	Due Date	Payment Status
Feasibility Study Fee	05368542-PN-0035540	\$1,000.00	\$73.96	\$1,073.96	Dec 12, 2023	Not Paid

Please click the 'Pay Fee Online' button for online payment.

Pay Fee Online

Take note of the computer generated "Primary Authorization Code" and "Secondary Authorization Code".

Click "Pay Fee Online". You will be redirected to Wells Fargo to submit payment.

Feasibility Study

Action: Feasibility Study Fee

Wells Fargo payment steps (one-time payment):

- Open "make payment" tab
- Use Primary and Secondary authorization codes
- Authorization codes located within Fee Action

Wells Fargo payment steps (registered):

- Use your login credentials to login into your account
- Your Wells Fargo credentials will differ from your DER portal credentials
- Your invoice will appear in the top right corner

The screenshot shows the Wells Fargo login interface. At the top, there are two tabs: "LOGIN" and "MAKE PAYMENT". Below the "LOGIN" tab, there is a red-bordered box labeled "Registered Users". Below the "MAKE PAYMENT" tab, there is a red-bordered box labeled "One-Time Payments". The login form includes a "Login ID" field, a "Password" field, and a green "Login" button. There are also links for "Forgot your Login ID?" and "Password Help?".

Feasibility Study

Step: Complete

- After Xcel Energy has completed the Feasibility Study, view the Feasibility Study Report and proceed to the next step indicated.

Case #: 05368515
Status: Feasibility Study
Step: Complete
Sub-Step:
App Owner: The Feasibility Study for your application is now complete. View the results of the study.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
View Feasibility Study Report	View the results of your Feasibility Study.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Feasibility Study

Action: View Feasibility Study Report

- View the Feasibility Study Report and proceed to the next step indicated.

Engineer: **Further Study Needed, Proceed with System Impact Study**

You can now view the report by downloading the file below.

Feasibility Study Report

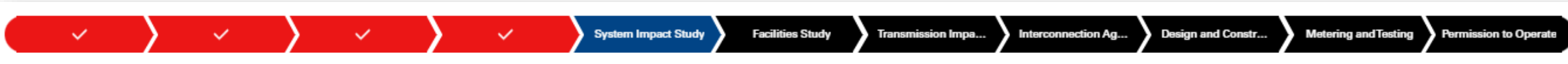
11/17/2023, 04:06 PM CST

Proceed to Next Step

System Impact Study

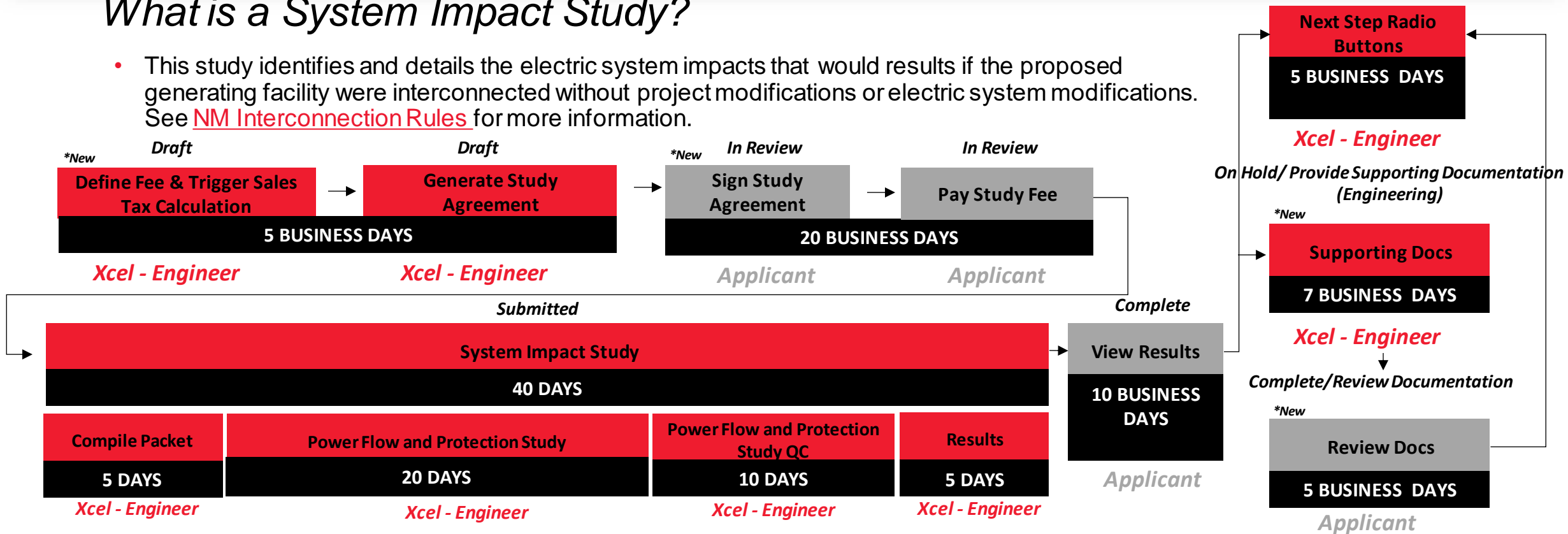
System Impact Study

Process Flow



What is a System Impact Study?

- This study identifies and details the electric system impacts that would result if the proposed generating facility were interconnected without project modifications or electric system modifications. See [NM Interconnection Rules](#) for more information.



Note: Prior to starting any Detailed Study, the Applicant may choose to schedule or waive a scoping meeting. For more details/screenshots on the Scoping Meeting process, please see the 'Scoping Meeting' section.

System Impact Study

Step: In Review

- The applicant will review the System Impact Study Invoice provided by Xcel, sign the invoice and then complete the payment for this study.

Case #: 05368158
Status: System Impact Study
Step: In Review
Sub-Step:
App Owner: Xcel Energy has indicated your application needs a System Impact Study. View and sign your Invoice and pay the fee within 20 business days.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
System Impact Study Fee	Pay System Impact Study Fee through online payment to advance your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action
System Impact Study Invoice	View your System Impact Study Invoice Agreement.	Open	Applicant	<input checked="" type="checkbox"/>	Action

After completing all actions, click "Submit"

For each of these actions, you'll find slides with screenshots & helpful tips:

System Impact Study Invoice



System Impact Study Fee

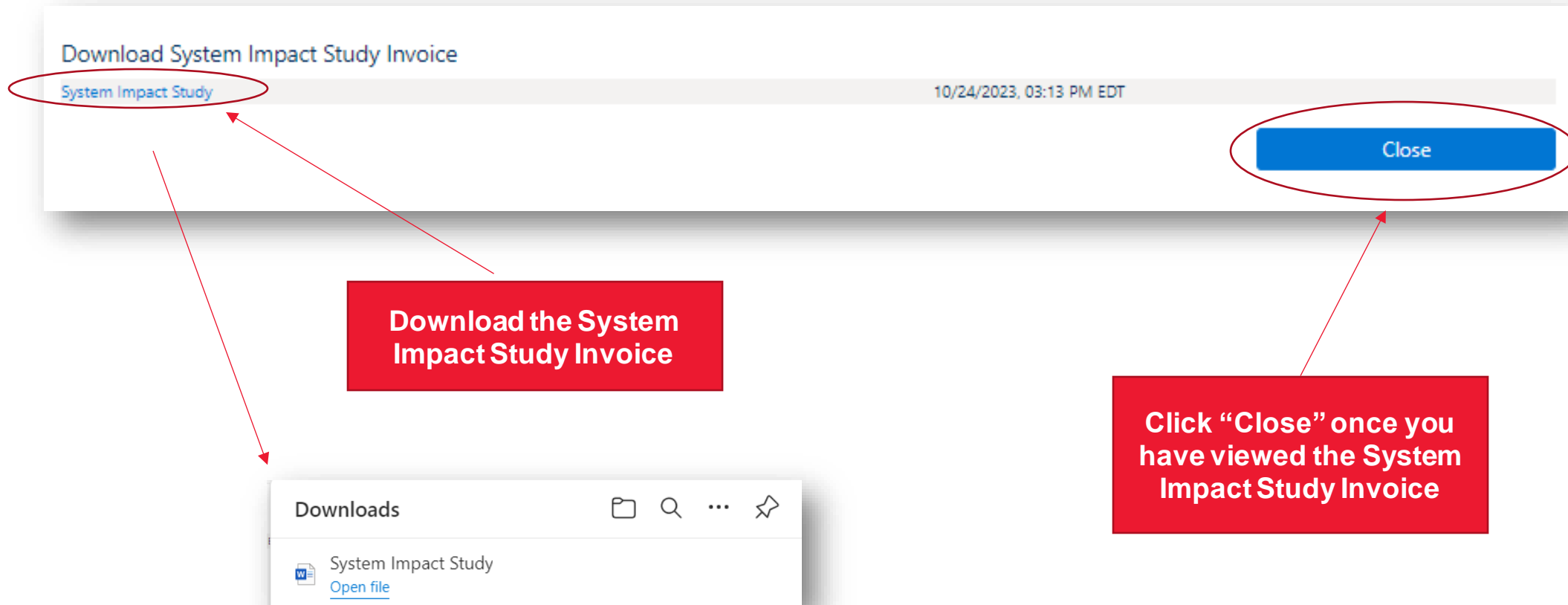
[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
Generate System Impact Study Fee & Invoice	Xcel Energy to generate System Impact Study Invoice and populate	Xcel Energy	11/15/2023, 02:00 AM EST	11/17/2023, 06:30 PM EST

System Impact Study

Action: System Impact Study Invoice

- After Xcel has generated the invoice for your upcoming System Impact Study, you can view it.
- To access the invoice, click on the document name and download the document.



System Impact Study

Action: Sign System Impact Study Invoice

- After reviewing the invoice, the 'Sign System Impact Study Invoice' will be displayed, and you will be directed to sign the invoice.

Sign System Impact Study Invoice	Please sign your System Impact Study Invoice Agreement.	Open	Applicant	<input checked="" type="checkbox"/>	Action
----------------------------------	---	------	-----------	-------------------------------------	--------

BY SIGNING, I ACKNOWLEDGE THAT I HAVE READ, UNDERSTOOD, AND AGREE TO ALL OF THE TERMS OF THIS SYSTEM IMPACT STUDY AGREEMENT.

By: _____

Name: _____

Title: _____

Date: _____

Applicant to sign bottom portion of Invoice

Click 'Submit' once uploaded

Applicant to upload signed invoice

Note: Please upload the signed System Impact Study Invoice. To download and view your invoice, please visit the "View System Impact Study" action.

Upload signed System Impact Study Invoice


Or drop files

System Impact Study 10/24/2023, 03:52 PM EDT [Remove](#)

System Impact Study

Action: System Impact Study Fee

- After reviewing and signing the invoice, you will be directed to pay the System Impact Study Fee through Wells Fargo.

System Impact Study Fee	Pay System Impact Study Fee through online payment to advance your application.	Open	Applicant		Action
-------------------------	---	------	-----------	---	--------

Helpful Tips:

- Click the "action" button to pay the distribution system study fee.
- You will have 20 business days to pay the System Impact Study Fee.

System Impact Study

Action: System Impact Study Fee

Please see directions below for online payment. If preferred, fee(s) can always be paid traditionally via check/wire and form.

- Fee invoice(s) are available now on the Wells Fargo payment site.
- The invoice(s) are ready for online payment.
- Payments will post to the applicable application ID the day after payment is made to Wells Fargo (another 24 hours).
- Please enter Primary Authorization Code **SR-10937239** and Secondary Authorization Code **321111** to complete online payment with Wells Fargo.
- Primary and Secondary codes are unique to your account. Once an account is set-up, you can use the same codes for each application as needed.
- Credit card payment will not be accepted.

Payment Details:

Item Description	Invoice Number	Fee Amount Due	Sales Tax Amount Due	Total Amount Due	Due Date	Payment Status
System Impact Study Fee	05368158-PN-0035533	\$125.00	\$6.09	\$131.09	Nov 21, 2023	Not Paid

Please click the 'Pay Fee Online' button for online payment.

[Pay Fee Online](#)

Take note of the computer generated "Primary Authorization Code" and "Secondary Authorization Code".

Click "Pay Fee Online". You will be redirected to Wells Fargo to submit payment.

System Impact Study

Action: System Impact Study Fee

Wells Fargo payment steps (one-time payment):

- Open "make payment" tab
- Use Primary and Secondary authorization codes
- Authorization codes located within Fee Action

Wells Fargo payment steps (registered):

- Use your login credentials to login into your account
- Your Wells Fargo credentials will differ from your DER portal credentials
- Your invoice will appear in the top right corner

The screenshot shows the Wells Fargo login interface. At the top, there are two tabs: 'LOGIN' and 'MAKE PAYMENT'. Below the 'LOGIN' tab, there is a red-bordered box labeled 'Registered Users'. Below the 'MAKE PAYMENT' tab, there is a red-bordered box labeled 'One-Time Payments'. The login form includes a 'Login ID' field, a 'Password' field, and a green 'Login' button. There are also links for 'Forgot your Login ID?' and 'Password Help?'.

System Impact Study

Step: In Review

- Once all actions are updated to “Draft”, click “Submit” to move the application forward.

Case #: 05368158
Status: System Impact Study
Step: In Review
Sub-Step:
App Owner: Xcel Energy has indicated your application needs a System Impact Study. View and sign your Invoice and pay the fee within 20 business days.

[Submit](#)

Actions		Finalized Actions	Milestones	Completed Milestones	Application Details		
ACTION NAME	DESCRIPTION			STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Sign System Impact Study Invoice	Please sign your System Impact Study Invoice Agreement.			Draft	Applicant	<input checked="" type="checkbox"/>	Action
System Impact Study Fee	Pay System Impact Study Fee through online payment to advance your application.			Draft	Applicant	<input checked="" type="checkbox"/>	Action
System Impact Study Invoice	View your System Impact Study Invoice Agreement.			Draft	Applicant	<input checked="" type="checkbox"/>	Action

System Impact Study

Step: Complete

- After Xcel Energy has completed the System Impact Study, view the System Impact Study Report and choose the next step to move the application forward.
- If Xcel identified a Facilities Study is needed, view the Facilities Study Agreement.

Case #: 05368158
Status: System Impact Study
Step: Complete
Sub-Step:
App Owner: The System Impact Study for your application is complete. View the results of the study.

Submit

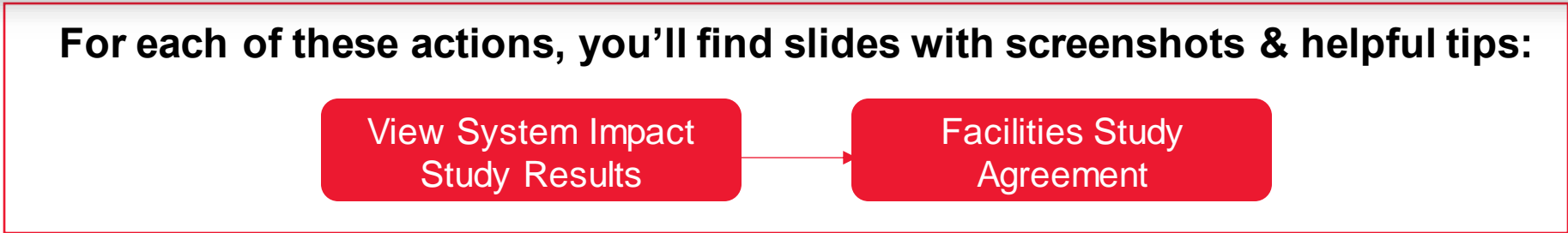
Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Facilities Study Agreement	View your Facilities Study Agreement	Open	Applicant	<input type="checkbox"/>	Action
View System Impact Study Results	Download and review your System Impact Study Results.	Open	Applicant	<input type="checkbox"/>	Action

After completing all actions, click "Submit"

Actions Finalized Actions **Milestones** Completed Milestones

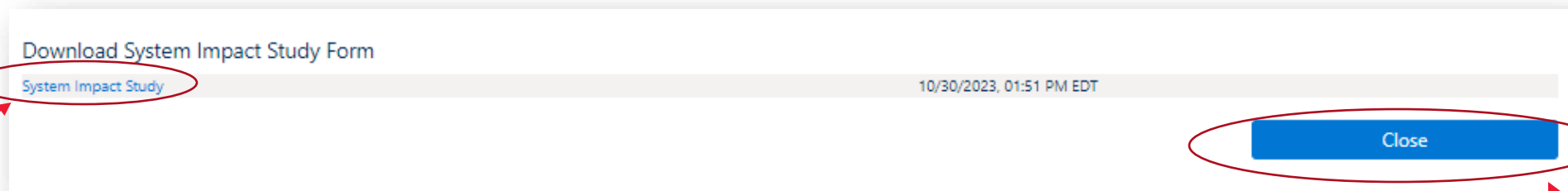
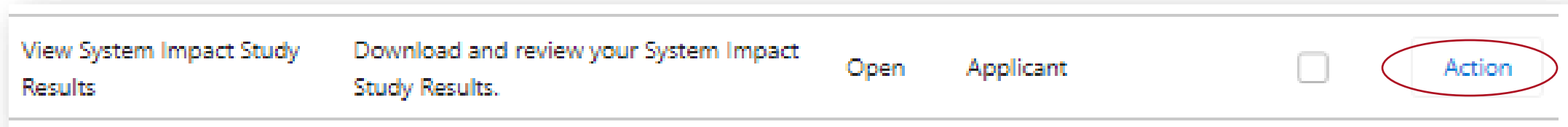
TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
View System Impact Study Results	View the results of your System Impact Study and click Submit within 10 business days to proceed with your application.	Applicant	11/16/2023, 02:00 AM EST	11/29/2023, 06:30 PM EST



System Impact Study

Action: View System Impact Study Results

- View the System Impact Study Report and choose the next step to move the application forward.



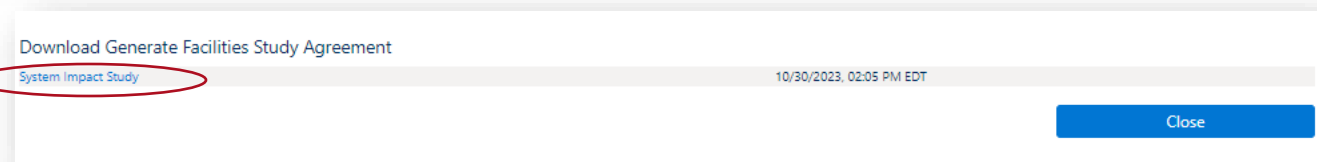
Click to download System Impact Study Results Form

After downloading, click 'Close'

System Impact Study

Action: Facilities Study Agreement

- This action will only be triggered if Xcel indicates a facility study agreement is needed when reviewing System Impact Study results.
- View the Facilities Study Agreement and choose the next step to move the application forward.



Click to download System Impact Study Results Form

System Impact Study

Step: Complete

- After reviewing both System Impact Study Results and (if applicable) Facilities Study Agreement, choose the Next Step to move your application forward.

Case #: 05368158
Status: System Impact Study
Step: Complete
Sub-Step:
App Owner: The System Impact Study for your application is complete. View the results of the study.

Submit

*** Choose the Next Step**

I would like the utility to move the application forward.

I would to provide supporting documentations and workpapers developed in the preparation of the system impact study.

Next

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Facilities Study Agreement	View your Facilities Study Agreement	Draft	Applicant	<input type="checkbox"/>	Action
View System Impact Study Results	Download and review your System Impact Study Results.	Draft	Applicant	<input type="checkbox"/>	Action

Choose the Next Step by selecting either option

Click 'Submit' to choose next step

Click 'Next' once Next Step is selected

System Impact Study

Step: Complete

- If you do not wish to view further documentation from Xcel, select

Case #: 05368158
Status: System Impact Study
Step: Complete
Sub-Step:
App Owner: The System Impact Study for your application is complete. View the results of the study.

Submit

*Choose the Next Step

I would like the utility to move the application forward.

I would to provide supporting documentations and workpapers developed in the preparation of the system impact study.

Next

- If you do wish to view further documentation select.....

Case #: 05367370
Status: System Impact Study
Step: Complete
Sub-Step:
App Owner: The System Impact Study for your application is complete. View the results of the study.

Submit

*Choose the Next Step

I would like the utility to move the application forward.

I would to provide supporting documentations and workpapers developed in the preparation of the system impact study.

Next

After selecting a Next Step, click "Next"

System Impact Study

Step: Complete Sub-Step: Review Documentation

- Applicant to review the requested supporting documentation of the System Impact Study provided by Xcel within 5 business days and move the application forward.

Case #: 05367370
Status: System Impact Study
Step: Complete
Sub-Step: Review Documentation
App Owner: Applicant to review supporting documentation and workpapers developed in the preparation of the system impact study within 5 business days and move application forward.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
View System Impact Study Supporting Documentation	View the supporting documentation.	Open	Applicant	<input type="checkbox"/>	Action

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#)

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
System Impact Study – Review Supporting Documentation	Review supporting documentation and workpapers developed in the preparation of the system impact study within 5 business days and move application forward.	Applicant	11/20/2023, 01:00 AM CST	11/24/2023, 05:30 PM CST

System Impact Study

Step: Complete Sub-Step: Review Documentation

- Applicant to review the request supporting documentation of the System Impact Study provided by Xcel within 5 business days and move the application forward.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
View System Impact Study Supporting Documentation	View the supporting documentation.	Open	Applicant	<input type="checkbox"/>	Action

Click 'Action'

Download System Impact Study Supporting Documentation

[Supporting Documentation](#) 11/15/2023, 02:23 PM EST

Close

Click to view Documentation

Facilities Study

Facilities Study

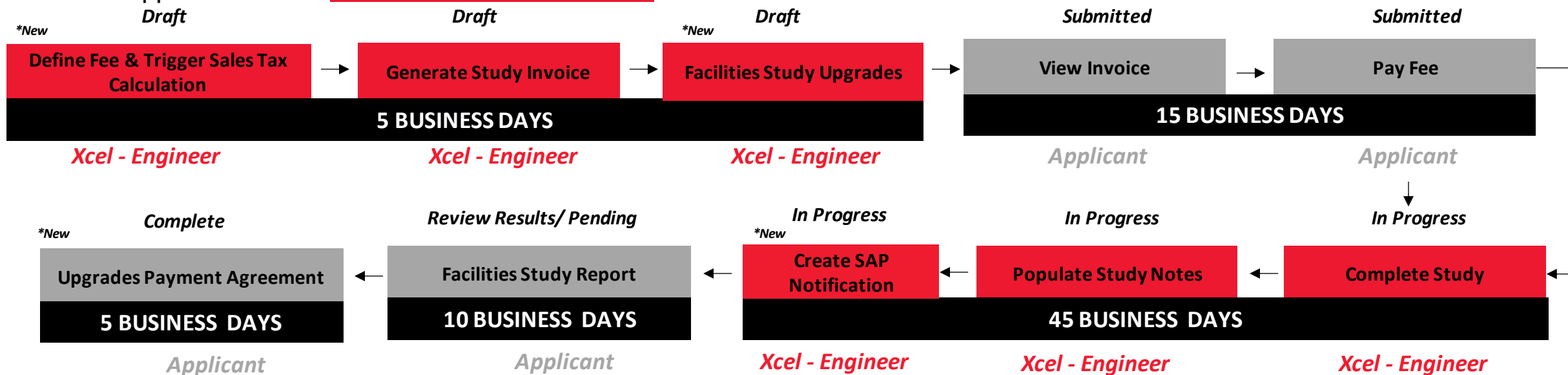
Process Flow

Note: the below describes the Facilities Study process for applications which require upgrades. If upgrades are not required, there are slight nuances to the process (i.e., decreased study time duration, step changes) that can be seen in more detail at the end of this section.



What is a Facilities Study?

- This is a study that specifies and estimates the cost of the equipment, engineering, procurement, and construction work needed to implement the conclusions of the system impact study. Upon completion of the study within 45 days, if the applicant agrees to pay for the interconnection facilities or upgrades identified within this study, the status will move to Interconnection Application. Upon completion of the study, the applicant will have the option to withdraw their application. See [NM Interconnection Rules](#) for more information.



Note: Prior to starting any Detailed Study, the Applicant may choose to schedule or waive a scoping meeting. For more details/screenshots on the Scoping Meeting process, please see the 'Scoping Meeting' section.

Facilities Study

Step: Submitted

- After Xcel has generated the invoice for your upcoming Feasibility Study, you can view it and pay the fee.
- During the Submitted step, you will be directed to review the invoice and pay the Feasibility Study Fee through Wells Fargo.

Case #: 05368539
Status: Facilities Study
Step: Submitted
Sub-Step:
App Owner: Xcel Energy has indicated your application needs a Facilities Study. View your Invoice and pay the fee within 15 business days.

Submit

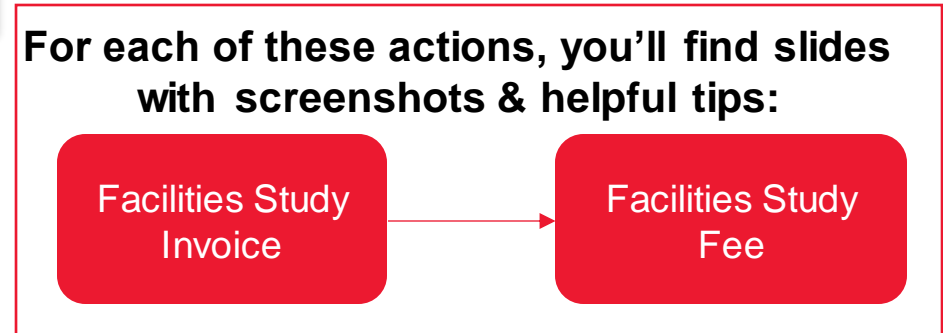
Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Facilities Study Fee	Pay Facilities Study Fee through online payment to advance your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Facilities Study Invoice	View your Facilities Study Invoice.	Open	Applicant	<input checked="" type="checkbox"/>	Action

After completing all actions, click "Submit"

Actions Finalized Actions Milestones Completed Milestones Application Details

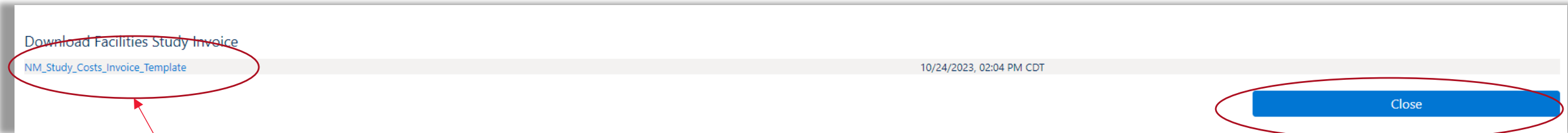
Facilities Study Review Invoice and Pay Fee	Review the invoice for the Facilities Study and electronically pay the Facilities Study Fee within 15 business days.	Applicant	11/17/2023, 01:00 AM CST	12/11/2023, 05:30 PM CST
---	--	-----------	--------------------------	--------------------------



Facilities Study

Action: Facilities Study Invoice

- After Xcel has generated the invoice for your upcoming Facilities Study, you can view it.
- In order to access the invoice, click on the document name and download the document.



Download the Facilities Study Invoice

Click "Close" once you have viewed the Facilities Study Invoice

Facilities Study

Action: Facilities Study Fee

- After reviewing the invoice, you will be directed to pay the Facilities Study Fee through Wells Fargo.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Facilities Study Fee	Pay Facilities Study Fee through online payment to advance your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Helpful Tips:

- Click the "Action" button to pay the Facilities Study fee.
- You will have 15 business days to pay the Facilities Study Fee.

Facilities Study

Action: Facilities Study Fee

- After reviewing the invoice, you will be directed to pay the Facilities Study Fee through Wells Fargo.

Please see directions below for online payment. If preferred, fee(s) can always be paid traditionally via check/wire and form.

- Fee invoice(s) are available now on the Wells Fargo payment site.
- The invoice(s) are ready for online payment.
- Payments will post to the applicable application ID the day after payment is made to Wells Fargo (another 24 hours).
- Please enter Primary Authorization Code **SR-10937239** and Secondary Authorization Code **321111** to complete online payment with Wells Fargo.
- Primary and Secondary codes are unique to your account. Once an account is set-up, you can use the same codes for each application as needed.
- Credit card payment will not be accepted.

Take note of the computer generated "Primary Authorization Code" and "Secondary Authorization Code".

Payment Details:

Item Description	Invoice Number	Fee Amount Due	Sales Tax Amount Due	Total Amount Due	Due Date	Payment Status
Facilities Study Fee	05368539-PN-0035532	\$0.00	\$0.00	\$0.00	Nov 14, 2023	Not Paid

Please click the 'Pay Fee Online' button for online payment.

Click "Pay Fee Online". You will be redirected to Wells Fargo to submit payment.

Facilities Study

Action: Facilities Study Fee

Wells Fargo payment steps (one-time payment):

- Open "make payment" tab
- Use Primary and Secondary authorization codes
- Authorization codes located within Fee Action

Wells Fargo payment steps (registered):

- Use your login credentials to login into your account
- Your Wells Fargo credentials will differ from your DER portal credentials
- Your invoice will appear in the top right corner

The screenshot shows the Wells Fargo login interface. At the top, there are two tabs: "LOGIN" and "MAKE PAYMENT". Below the "LOGIN" tab, there is a red-bordered box labeled "Registered Users". Below the "MAKE PAYMENT" tab, there is a red-bordered box labeled "One-Time Payments". The login form includes a "Login ID" field with a vertical cursor, a "Password" field, and a green "Login" button. There are also links for "Forgot your Login ID?" and "Password Help?".

Facilities Study

Step: Submitted

- After paying the Facilities Study Fee, click Submit to move the application forward.

Case #: 05368539
Status: Facilities Study
Step: Submitted
Sub-Step:
App Owner: Xcel Energy has indicated your application needs a Facilities Study. View your Invoice and pay the fee within 15 business days.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Facilities Study Fee	Pay Facilities Study Fee through online payment to advance your application.	Draft	Applicant	<input checked="" type="checkbox"/>	Action
Facilities Study Invoice	View your Facilities Study Invoice.	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Facilities Study

Step: Review Results, Sub-Step: Pending

- After Xcel Energy has completed the Facilities Study, view the Facilities Study Results Report and move your application forward.

Case #: 05368539
 Status: Facilities Study
 Step: Review Results
 Sub-Step: Pending
 App Owner: Your application is pending your decision to schedule or forego a Facilities Study results meeting. (This meeting can only be omitted if there is mutual agreement between both parties.) In addition, your application is pending comments on the Facilities Study report draft. Comments are optional, proceed to the next step if you don't have any comments.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
View Facilities Study Results	Download and review your Facilities Study Results.	Open	Applicant	<input type="checkbox"/>	Action

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
View Facilities Study Results	View the results of your Facilities Study and click Submit within 10 business days to proceed with your application.	Applicant	11/16/2023, 01:00 AM CST	11/29/2023, 05:30 PM CST

Facilities Study

Action: View Facilities Study Results

- Review the results of the Facilities Study and provide comments, if necessary.

Please download the Facilities Study Results displayed below.

Engineering Comments:

If you would like to submit comments about the study, please [download the comment document](#), fill out and attach below. After attaching, click the Finalize button to submit your response.

Attachments

[Upload Files](#) Or drop files

Facilities Study Results

10/24/2023, 02:24 PM CDT

Finalize

Download the results,
provide comments, and
upload a new version

After reviewing the results,
click "Finalize"

Facilities Study

Step: Complete

- If upgrades are required for your application, to move the application forward, opt to pay for the interconnection facilities or the upgrades identified.

Case #: 05368539
 Status: Facilities Study
 Step: Complete
 Sub-Step:
 App Owner: Applicant to choose next step to move your application forward. Your Facilities Study is complete and the Interconnection Agreement will be issued by Xcel Energy within approximately 5 business days after you agree to pay for interconnection facilities or upgrades identified. Xcel Energy: Revise Facilities Study within 15 business days if comments, or generate Interconnection Agreement if applicant moves application forward.

[Submit](#)

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Upgrades Payment Agreement	Confirm your agreement to pay for Interconnection Facilities or Upgrades identified.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Actions Finalized Actions **Milestones** Completed Milestones Application Details

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
Facilities Study - Application Next Step Decision	Applicant to indicate how to proceed with the application within 5 Business Days.	Applicant	11/16/2023, 01:00 AM CST	11/22/2023, 05:30 PM CST

Facilities Study

Action: Upgrades Payment Agreement

- To move the application forward, agree to pay for the interconnection facilities or the upgrades identified to move your application forward.

Upgrades Payment Agreement

*Do you agree to pay for the Interconnection Facilities or Upgrades identified for this application?

--None--

As indicated in section 17.9.568.18 of the NM Interconnection Rule, upon completion of the facilities study, the interconnection applicant must agree to pay for interconnection facilities or upgrades identified in the study prior to the utility providing the interconnection applicant with an executable interconnection agreement.

[Submit](#)

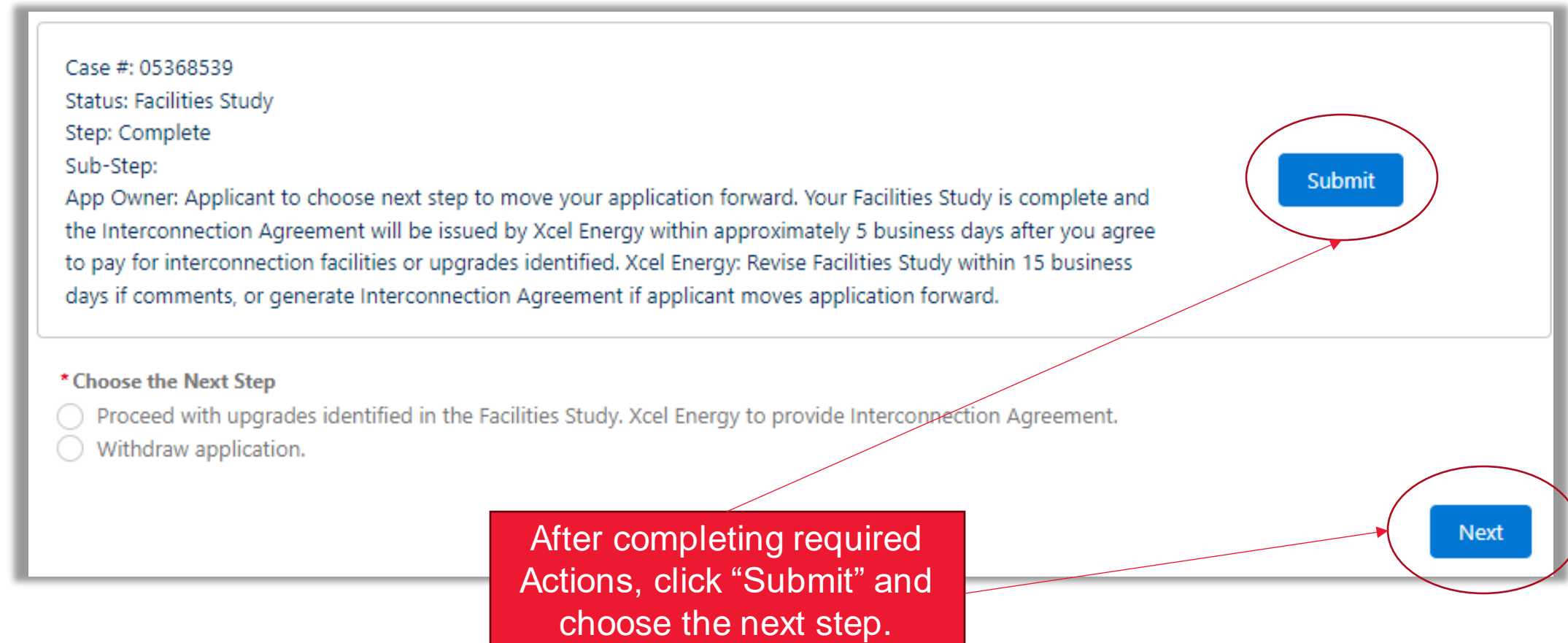
Note: the “Upgrades Payment Agreement” action will only be triggered if upgrades are required for the application.

After completing required fields, click “Submit”

Facilities Study

Step: Complete

- Choose the Next Step to move your application forward.



Case #: 05368539
Status: Facilities Study
Step: Complete
Sub-Step:
App Owner: Applicant to choose next step to move your application forward. Your Facilities Study is complete and the Interconnection Agreement will be issued by Xcel Energy within approximately 5 business days after you agree to pay for interconnection facilities or upgrades identified. Xcel Energy: Revise Facilities Study within 15 business days if comments, or generate Interconnection Agreement if applicant moves application forward.

*** Choose the Next Step**

Proceed with upgrades identified in the Facilities Study. Xcel Energy to provide Interconnection Agreement.

Withdraw application.

Submit

Next

After completing required Actions, click "Submit" and choose the next step.

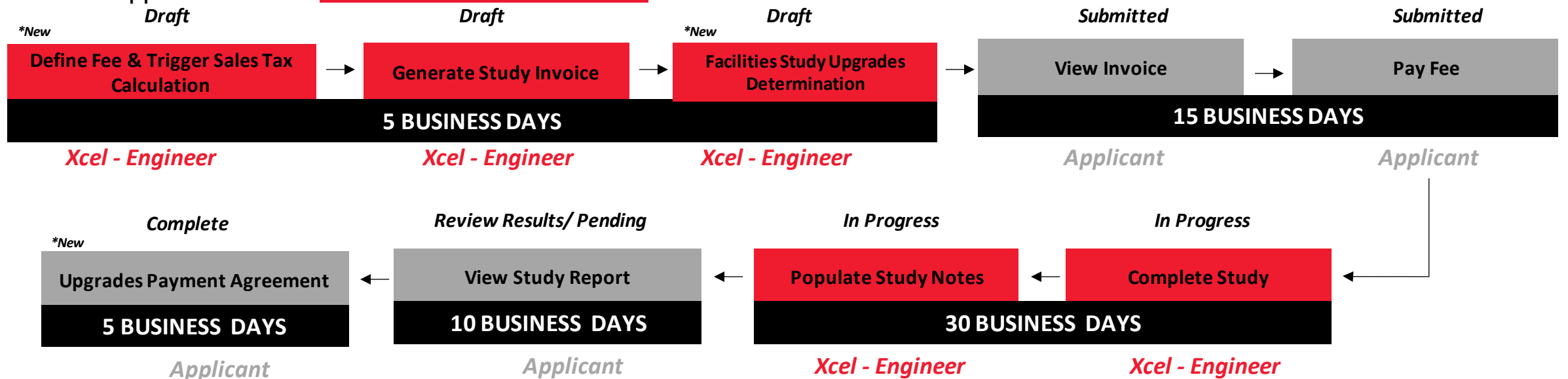
Facilities Study (No Upgrades Required)

Process Flow



What is a Facilities Study?

- This is a study that specifies and estimates the cost of the equipment, engineering, procurement, and construction work needed to implement the conclusions of the system impact study. Upon completion of the study within 30 days, if the applicant agrees to pay for the interconnection facilities or upgrades identified within this study, the status will move to Interconnection Application. Upon completion of the study, the applicant will have the option to withdraw their application. See [NM Interconnection Rules](#) for more information.



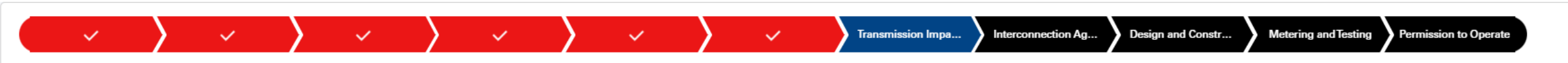
Note: Prior to starting any Detailed Study, the Applicant may choose to schedule or waive a scoping meeting. For more details/screenshots on the Scoping Meeting process, please see the 'Scoping Meeting' section.

Transmission Impact Study



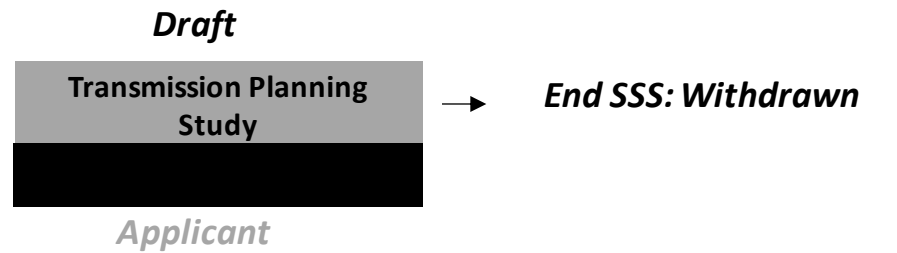
Transmission Impact Study

Process Flow



What is a Transmission Impact Study?

- The purpose of the study is to identify the impacts to the transmission system and any affected systems from a solar photovoltaic facility interconnection on the customer’s retail load. If the application reaches this study, the application will automatically be withdrawn after the applicant reviews instructions to be redirected to the Transmission Department within Xcel Energy. **Contact Xcel Energy Transmission Business Relations (TBR): [Interconnections | Transmission | Xcel Energy](#)**



Note: Prior to starting any Detailed Study, the Applicant may choose to schedule or waive a scoping meeting. **For more details/screenshots on the Scoping Meeting process, please see the ‘Scoping Meeting’ section.**

Interconnection Application 05367154

Program Type: Distributed Generation | Product: CO - Distributed Energy Resource only | Address: | City: | County: Adams

Case #: 05367154
 Status: Transmission Impact Study
 Step: Draft
 Sub-Step:
 App Owner: Xcel Energy has indicated that your application needs a Transmission Study. View instructions below.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Transmission Planning Study	View instructions for proceeding with Transmission Study.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Please see Milestones tab for deadline.

Transmission Impact Study

Step: Draft

- After you have selected to proceed with the Transmission Impact Study, you will be directed to the Transmission Impact Study status.
- During the Draft step, the Applicant will review instructions for creating an application with the Transmission Department.
- If the application reaches this study, the application will be withdrawn after the applicant reviews instructions to be redirected to the Transmission Department within Xcel Energy.

Case #: 05368515

Status: Transmission Impact Study

Step: Draft

Sub-Step:

App Owner: Xcel Energy has indicated that your application needs a Transmission Study. View instructions below to be redirected to the Transmission Department to create an application.

Transmission Impact Study

Step: Draft

- View the instructions to proceed with the Transmission Impact Study.

Case #: 05368515
Status: Transmission Impact Study
Step: Draft
Sub-Step:
App Owner: Xcel Energy has indicated that your application needs a Transmission Study. View instructions below to be redirected to the Transmission Department to create an application.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Transmission Planning Study	View instructions for proceeding with Transmission Study.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Transmission Impact Study

Step: Draft

- View the instructions to proceed with the Transmission Impact Study.

After viewing the link, click "Close"

Transmission Planning Study

Your application requires a Transmission Study. Please follow [this link](#) for more information on how to submit an application and contact Xcel Energy Transmission Business Relations (TBR).

Xcel Energy

Transmission Transcos Resources Projects Right of Way About 🔍

🏠 / Interconnections

Interconnections

Transmission Business Relations

Transmission Business Relations (TBR) provides transmission contract negotiation and customer relations for the four Xcel Energy operating companies, Northern States Power Minnesota (NSPM), Northern States Power Wisconsin (NSPW), Public Service Company of Colorado (PSCO) and Southwestern Public Service Company (SPS). TBR is responsible for all transmission related interconnections (load, transmission, and generation), maintenance and or operating agreements, asset sales or exchanges and the management of all small and large Xcel Energy transmission customer agreements.

NSPM and NSPW are members of the Midcontinent Independent System Operator, Inc. (MISO). New generation and transmission interconnections are subject to the MISO Tariff on file with the Federal Energy Regulatory Commission (FERC). New load and transmission interconnections are subject to the Xcel Energy Operating Companies Tariff also on file with the FERC.

PSCO new interconnections are subject to the Xcel Energy Open Access Transmission Tariff.

SPS is a member of the Southwest Power Pool (SPP). New generation and transmission interconnections are subject to the SPP Tariff on file with the Federal Energy Regulatory Commission (FERC). New load and transmission interconnections are subject to the Xcel Energy Operating Companies Tariff also on file with the FERC.

Close

Transmission Impact Study

Step: Draft

- After viewing the instructions, click “Submit.”
- Upon clicking “Submit”, the application will automatically be withdrawn.
- Note: Please work with the Transmission Department, as indicated by reviewed instructions to move forward.

Case #: 05368515
Status: Transmission Impact Study
Step: Draft
Sub-Step:
App Owner: Xcel Energy has indicated that your application needs a Transmission Study. View instructions below to be redirected to the Transmission Department to create an application.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Transmission Planning Study	View instructions for proceeding with Transmission Study.	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Transmission Impact Study

Step: Withdrawn

- Upon clicking “Submit”, the application will automatically be withdrawn.
- Note: Please work with the Transmission Department, as indicated by reviewed instructions to move forward.

Case #: 05368515

Status: Withdrawn

Step:

Sub-Step:

Interconnection Agreement

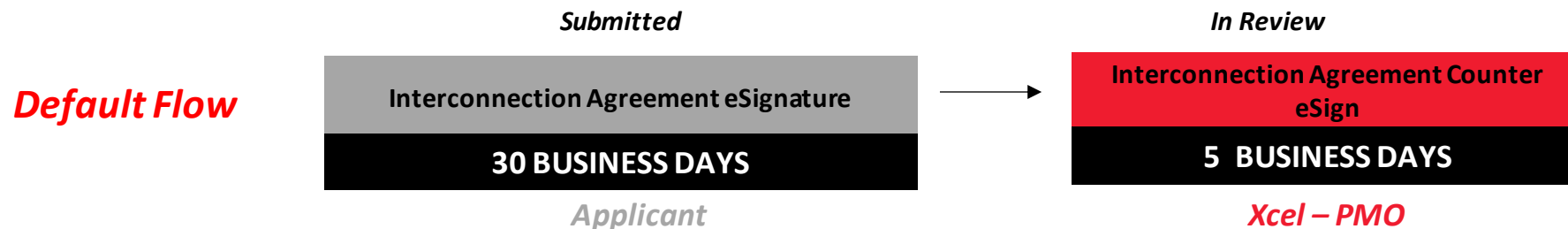


Interconnection Agreement

Process Flow



- This is the status where both the applicant and utility sign the Interconnection Agreement Contract that formally documents terms and conditions related to the operation and maintenance of any DER in accordance with the NM regulation Non-Simplified Interconnection Agreement.
- The Interconnection Agreement may be manually generated by the utility if needed (see slide at the end of section).
- Simplified Applications that did not trigger a Detailed Study do not require the signature of an Interconnection Agreement. See [NM Interconnection Rules](#) for more information.



***FOR S*RC PROGRAM THE SIGNATURE OF AN INTERCONNECTION AGREEMENT IS ALWAYS REQUIRED.**

Interconnection Agreement

Step: Submitted

- Once all required studies have been completed, you will need to sign the Interconnection Agreement.

Note: This SSS is only triggered if the track type is **Fast or Detailed Study**.

Any Simple Track applications that did not trigger a detailed study **do not require a signed IA.**

Case #: 05368539
 Status: Interconnection Agreement
 Step: Submitted
 Sub-Step:
 App Owner: Your application is pending your signature on the interconnection agreement. Please sign the interconnection agreement and return within 30 business days.

[Submit](#)

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Interconnection Agreement eSignature	Please check your email and electronically sign all required documents.	Open	Applicant	<input checked="" type="checkbox"/>	Action

After completing all actions, click "Submit"

Actions Finalized Actions Milestones Completed Milestones Application Details

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
Interconnection Application Timeline	You have 12 months to complete your application. If an extension is required, reach out to Xcel Energy using the Chatter feature.	Applicant	9/8/2023, 01:00 AM CDT	9/6/2024, 05:30 PM CDT
Sign the Interconnection Agreement	Sign your Interconnection Agreement within 30 business days	Applicant	9/8/2023, 01:00 AM CDT	10/19/2023, 05:30 PM CDT

Interconnection Agreement

Action: Interconnection Agreement eSignature

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Interconnection Agreement eSignature	Please check your email and electronically sign all required documents.	Open	Applicant	<input checked="" type="checkbox"/>	Action

An email has been sent to you and/or the interconnection customer with a link to e-sign documents. Please view the status table below.

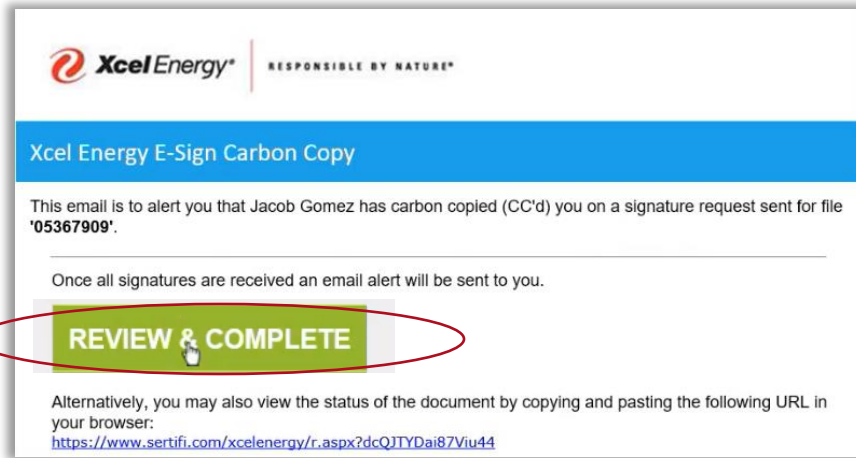
Once all of the signatures have been collected, the action will be marked as "Draft" and the application will be able to advance to the next step.

Document Title	Activity	Signer	User	ActivityTime
	Signer invited	Customer	regina.calvo.salinas@xcelenergy.com	Nov 30, 2023

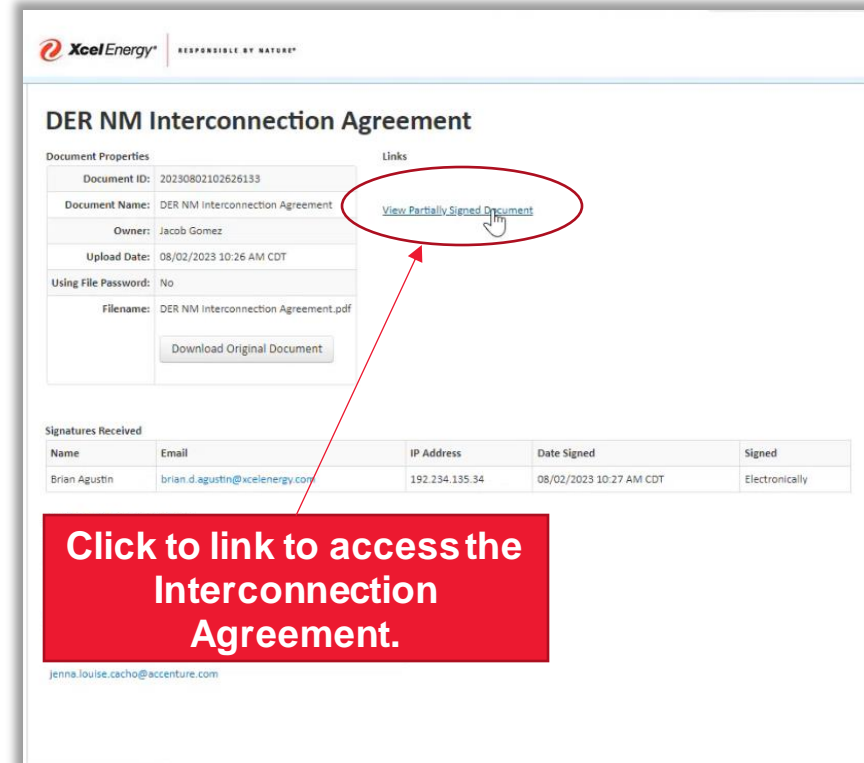
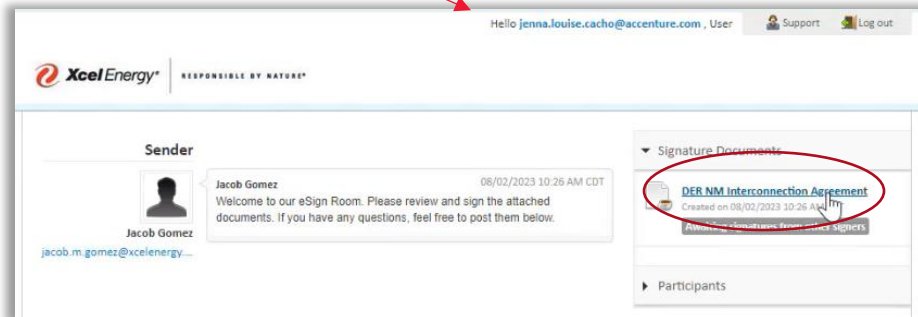
Interconnection Agreement

Action: Interconnection Agreement eSignature

Check your email (Customer) for the E-sign request & click the link to sign via Sertifi. *Note: the Application Agent will be cc-ed for visibility.



Once in Sertifi, if you are the Customer, click the document to view & sign.



Click to link to access the Interconnection Agreement.

Interconnection Agreement

Action: Interconnection Agreement eSignature

I am applying an e-signature in my name to this document and have read the [Consumer Disclosure](#)

Finish & Submit Electronically

Once completed, click "Finish and Submit Electronically"

APPENDIX 1C
Interconnection Agreement

Generating Facilities With a Rated Capacity No Greater than 10 MW and Not Qualified for Simplified Interconnection

This Generating Facility Interconnection Agreement ("Agreement") is entered into by and between Southwestern Public Service Company, d/b/a Xcel Energy, a Texas and New Mexico corporation having a mailing address of 790 S Buchanan St, Amarillo, Texas, 79101 ("Utility") and SUMMER SMART, having a mailing address of 1901 E PINE LODGE RD, ROSWELL, New Mexico, 88201 ("Interconnection Customer"). The Interconnection Customer and the Utility are sometimes referred to in this Agreement jointly as "Parties" or individually as a "Party".

In consideration of the mutual promises and obligations stated in this Agreement and its appendices, the Parties agree as follows:

I. SCOPE AND PURPOSE

IX. SIGNATURES

IN WITNESS WHEREOF, the Parties hereto have caused two originals of this Agreement to be executed by their duly authorized representatives. This Agreement is effective as of the last date set forth below.

Interconnection Customer

By: _____

Name: Brian Agustin
brian.d.agustin@xcelenergy.com

Title: SUMMER SMART

brian.d.agustin@xcelenergy.com

Date: 08/02/2023

Scroll through document & confirm appropriate signature, name, title, and date are populated.
**Note: The customer will be responsible for signing the Interconnection Agreement.*

Interconnection Agreement

Process Flow – Manual Flow



- The Interconnection Agreement may be manually generated by the utility if needed.



Interconnection Agreement

Step: Submitted

- Once Xcel has provided the manual generated Interconnection Agreement, you will need to sign the Interconnection Agreement.

Case #: 04108929
 Status: Interconnection Agreement
 Step: Submitted
 Sub-Step:
 App Owner: Your application is pending your signature on the interconnection agreement. Please sign the interconnection agreement and return within 30 business days.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Interconnection Agreement eSignature (Manual Generate)	Please check your email and electronically sign all required documents.	Open	Applicant		Action

Actions Finalized Actions Milestones Completed Milestones Application Details					
TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE	
Interconnection Application Timeline	You have 12 months to complete your application. If an extension is required, reach out to Xcel Energy using the Chatter feature.	Applicant	9/8/2023, 01:00 AM CDT	9/6/2024, 05:30 PM CDT	
Sign the Interconnection Agreement	Sign your Interconnection Agreement within 30 business days	Applicant	9/8/2023, 01:00 AM CDT	10/19/2023, 05:30 PM CDT	

Note: This SSS is only triggered if the track type is **Fast or Detailed Study**.

Any Simple Track applications that did not trigger a detailed study **do not require a signed IA.**

Interconnection Agreement

Action: Interconnection Agreement eSignature (Manual Generate)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Interconnection Agreement eSignature (Manual Generate)	Please check your email and electronically sign all required documents.	Open	Applicant		Action

An email has been sent to you and/or the interconnection customer with a link to e-sign documents. Please view the status table below.

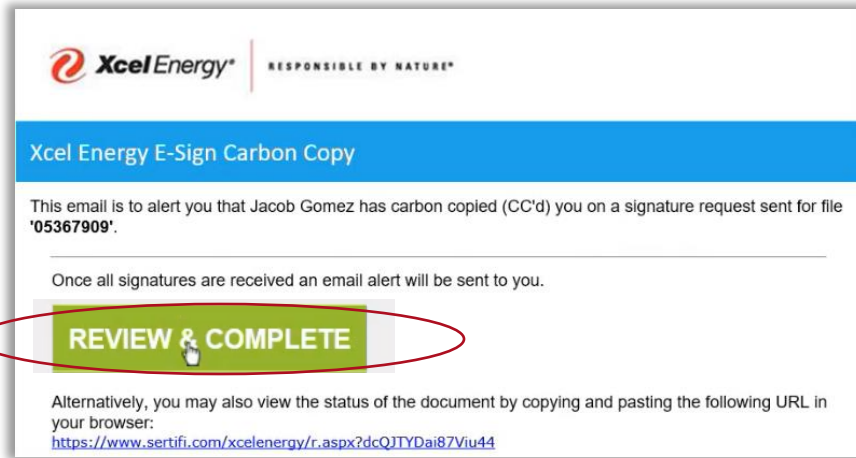
Once all of the signatures have been collected, the action will be marked as "Draft" and the application will be able to advance to the next step.

Document Title	Activity	Signer	User	ActivityTime
	Signer invited	Customer	✉ regina.calvo.salinas@xcelenergy.com	Nov 30, 2023

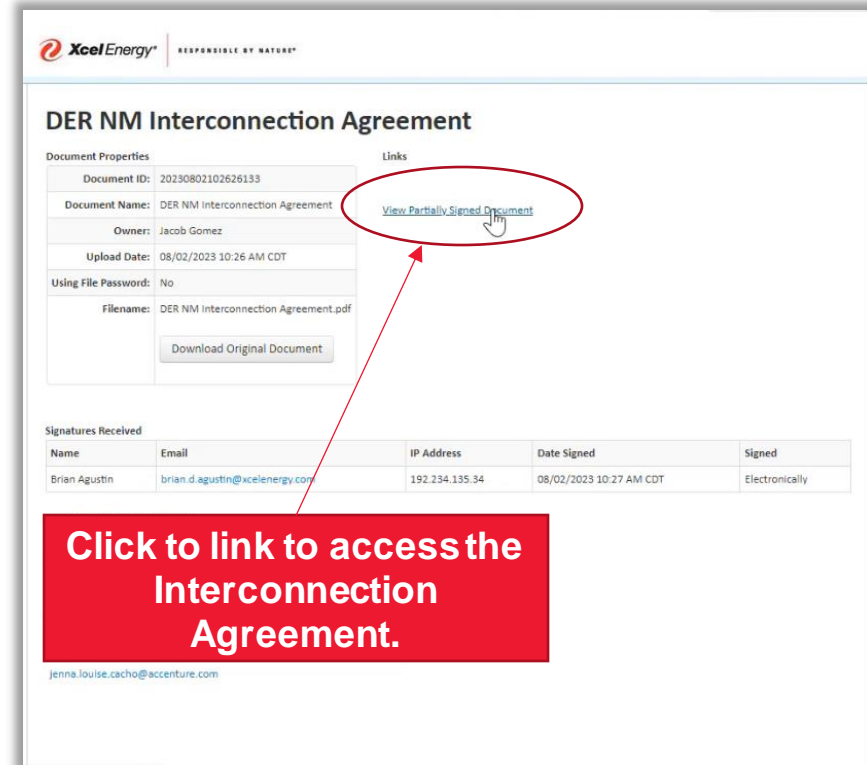
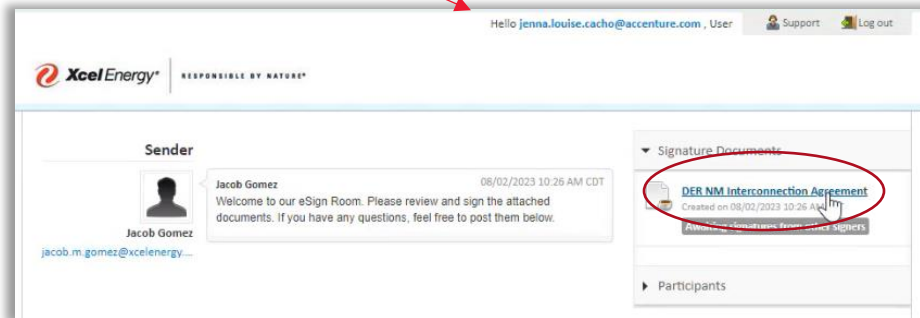
Interconnection Agreement

Action: Interconnection Agreement eSignature (Manual Generate)

Check your email (Customer) for the E-sign request & click the link to sign via Sertifi. *Note: the Application Agent will be cc-ed for visibility.



Once in Sertifi, if you are the Customer, click the document to view & sign.



Interconnection Agreement

Action: Interconnection Agreement eSignature (Manual Generate)

I am applying an e-signature in my name to this document and have read the [Consumer Disclosure](#) **Finish & Submit Electronically**

Once completed, click "Finish and Submit Electronically"

APPENDIX 1C
Interconnection Agreement

Generating Facilities With a Rated Capacity No Greater than 10 MW and Not Qualified for Simplified Interconnection

This Generating Facility Interconnection Agreement ("Agreement") is entered into by and between Southwestern Public Service Company, d/b/a Xcel Energy, a Texas and New Mexico corporation having a mailing address of 790 S Buchanan St, Amarillo, Texas, 79101 ("Utility") and SUMMER SMART, having a mailing address of 1901 E PINE LODGE RD, ROSWELL, New Mexico, 88201 ("Interconnection Customer"). The Interconnection Customer and the Utility are sometimes referred to in this Agreement jointly as "Parties" or individually as a "Party".

In consideration of the mutual promises and obligations stated in this Agreement and its appendices, the Parties agree as follows:

I. SCOPE AND PURPOSE

IX. SIGNATURES

IN WITNESS WHEREOF, the Parties hereto have caused two originals of this Agreement to be executed by their duly authorized representatives. This Agreement is effective as of the last date set forth below.

Interconnection Customer

By: _____
Name: Brian Agustin
brian.d.agustin@xcelenergy.com

SUMMER SMART

Title: _____
brian.d.agustin@xcelenergy.com

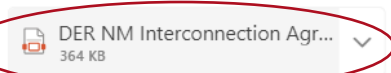
Date: _____
08/02/2023

Scroll through document & confirm appropriate signature, name, title, and date are populated.
***Note: The customer will be responsible for signing the Interconnection Agreement.**

Interconnection Agreement

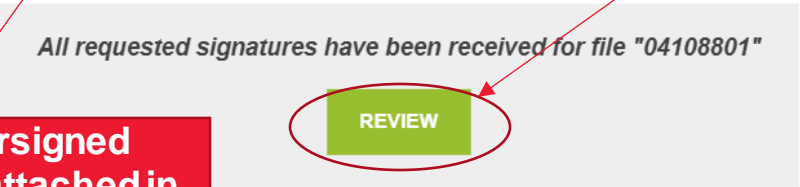
Step: Complete

- Once Xcel has counter signed the Interconnection Agreement, the application will automatically move to this Complete step.
- The Customer will receive an email confirming when all requested signatures have been received; this email will include an attachment with the signed document.

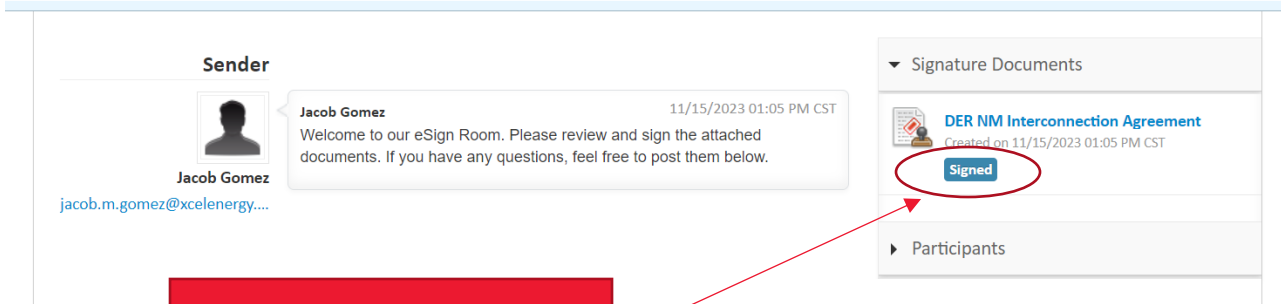


Check email for the confirmation notification & click the link to review the countersigned agreement via Sertifi.

EXTERNAL - STOP & THINK before opening links and attachments.



The countersigned agreement is attached in the confirmation email.



Once in Sertifi, click the document to view.

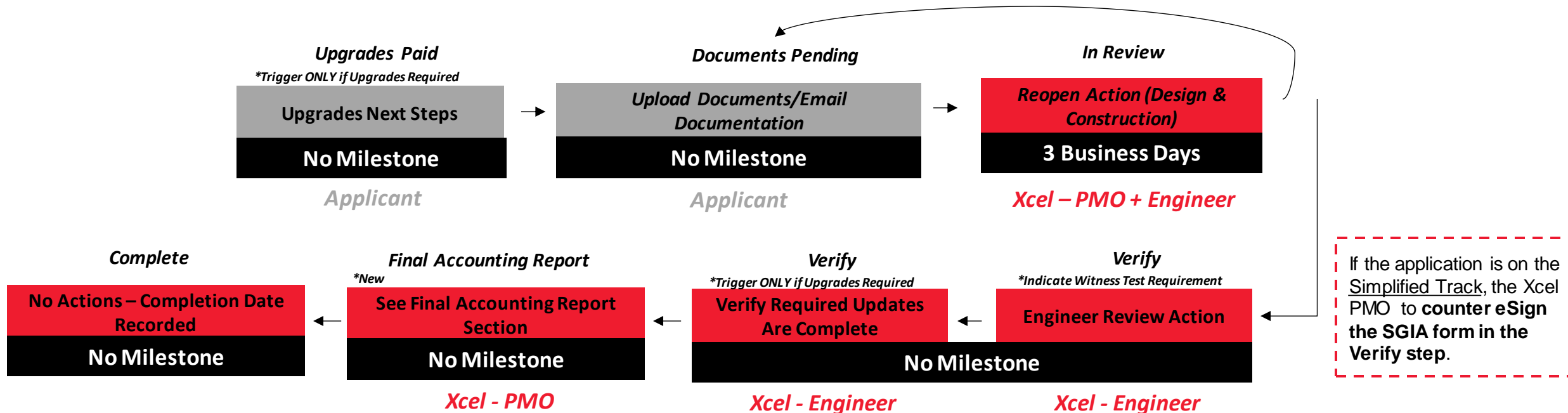
Design & Construction

Design & Construction

Process Flow



- After Xcel has approved the results of your review/studies, you will now be in the Design & Construction Status.
- For applications that require upgrades, during this status, the applicant will be prompted to confirm upgrades have been paid.
- During this status, you will be prompted to upload documents. If there is anything missing/incorrect, you will be asked to resubmit.



Design & Construction

Step: Upgrades Paid

- If your application requires upgrades, you will need to confirm whether you have paid for them during the Design & Construction status.
- If your application does not require upgrades, skip the 'Upgrades Paid' step next few slides.

Case #: 05368539
Status: Design and Construction
Step: Upgrades Paid
Sub-Step:
App Owner: Indicate whether you have paid for upgrades.

Submit

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Upgrades Next Steps	Please indicate whether you have paid for upgrades required. If you'd like to withdraw the application, please click the "Withdraw" button on the main portal screen.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Design & Construction

Action: Upgrades Next Steps

- If your application requires upgrades, you will need to confirm whether you have paid for them during the Design & Construction status.
- You must confirm payment for upgrades required in order to proceed with your application.

Initial Review Results

*Have you paid for upgrades required?

--None--

Submit

Design & Construction

Action: Upgrades Next Steps

- If your application requires upgrades, you will need to confirm whether you have paid for them during the Design & Construction Phase.
- You must confirm payment for upgrades required in order to proceed with your application.

Initial Review Results

*Have you paid for upgrades required?

--None--

Submit

Next Steps

You must confirm payment for upgrades required in order to proceed with your application. If you'd like to withdraw the application, please click the "Withdraw" button on the main portal screen.

If payment has not been confirmed, and "No" is selected you will receive this error and Action will remain open until you confirm

Design & Construction

Step: Upgrades Paid

- After you have confirmed upgrades have been paid, you will be able to move your application forward to the Documents Pending Step.

Case #: 05368539
Status: Design and Construction
Step: Upgrades Paid
Sub-Step:
App Owner: Indicate whether you have paid for upgrades.

Click "Submit"

Submit

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Upgrades Next Steps	Please indicate whether you have paid for upgrades required. If you'd like to withdraw the application, please click the "Withdraw" button on the main portal screen.	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Design & Construction

Step: Documents Pending

- After Xcel has approved the results of your Review (and studies), you will now be in the Design & Construction/Documents Pending.

Case #: 05368536
Status: Design and Construction
Step: Documents Pending
Sub-Step:
App Owner: Your application is pending submission of the following documents before testing and finalizing your application.

Submit

After completing all actions, click "Submit"

For each document required, you'll find slides with screenshots & helpful tips:

"As Built"
One Line
Diagram

"As Built"
Site Plan

911
Documentation

Equipment
Specification

Final
Electrical
Inspection

Installation
Details

Witness Test
Procedure

Insurance
Policy

Design & Construction

Action: “As Built” One Line Diagram

- Once you have completed and submitted all required documents, Xcel will review.
- If your One-Line Diagram has changed, please **upload** a revised document. Please ensure that your System Details and Equipment Specifications are consistent with your application.
- If there are any major changes, please submit as a modification request (click “Submit Proposed Modifications” button at the top of your screen).
- Note: This is not a required action. You will only need to upload a revised One Line, if necessary.

Click “Upload Files” and submit.

Upload As Built One Line Diagram

 Upload Files Or drop files

Submit

Design & Construction

Action: “As Built” Site Plan

- Once you have completed and submitted all required documents, Xcel will review.
- If your Site Plan has changed, please **upload** a revised document. Please ensure that your System Details and Equipment Specifications are consistent with your application.
- If there are any major changes, please submit as a modification request (click “Submit Proposed Modifications” button at the top of your screen).
- Note: This is not a required action. You will only need to upload a revised Site Plan, if necessary.

Click “Upload Files” and submit.

Upload As Built Site Plan

 Upload Files Or drop files

Submit

Design & Construction

Action: 911 Documentation

- Once you have completed and submitted all required documents, Xcel will review.
- Email your 911 Documentation to the **email** linked within the action.

Email 911 Documentation

Please email your 911 documentation to Builders Call Line South <BCL-TXNM@xcelenergy.com>.

Close

Click "Close" to exit the action

Design & Construction

Action: Equipment Specification

- Once you have completed and submitted all required documents, Xcel will review.
- Provide any remaining documentation on equipment, such as switch gear, PT & CT Cabinet, or any other equipment specifications/data sheets not yet provided **via email to your project's designer.**

Email Equipment Specification Documentation

Please **email** any remaining documentation on equipment, such as switch gear, PT & CT Cabinet, or any other equipment specifications/data sheets not yet provided to **your project's designer.**

Close

Click "Close" to exit the action

Design & Construction

Action: Final Electrical Inspection

- Once you have completed and submitted all required documents, Xcel will review.
- Download the Final Electrical Inspection form from the action and **email** the completed form **to the email provided**.
- Proof of a final/passing electrical inspection from the city or county/local AHJ is required for all applications.
- The final electrical inspection document must include:
 - The premise address.
 - The name/emblem of the inspection agency
 - The type of inspection (final/PV/solar electrical)
 - The outcome of the inspection (indication of pass/fail/release)
 - The date of the inspection.
 - The inspector's name and/or signature (electronic signature or initials are accepted)

Click "Close" to exit the action

Download [Final Electrical Inspection](#)

Email Final Electrical Inspection

Please **email** your 911 documentation to **Builders Call Line South** <BCL-TXNM@xcelenergy.com>

Close

Design & Construction

Action: Installation Details

- Once you have completed and submitted all required documents, Xcel will review.

Helpful Tips:

- **Inspection Date:** Enter the date the system was inspected by the city/county having jurisdiction.
- **PV/DG Installation Date:** Provide the date the system was fully installed. For PV systems, provide date prior to inspection.
- **Restricted Access to Meter Area:** Is there anything that would prevent Xcel energy from installing the meter at the earliest possible time? If so, please select "yes" and enter any notes in the application notes field on the next screen.
 - **Do not answer yes unless the meter truly has restricted access. If you errantly select yes, this may cause delays to the installation for our mutual customer.**
 - If you check "yes" you must provide a reason for the restricted access. if no reason is provided, an appointment will not be requested for this customer.
 - Restricted access reasons = pets not locked up, locked gates, restricted area.
 - Once the meters have been ordered, an associate from the metering department will contact the customer directly to set up an appointment.

* Final Invoice Amount ⓘ

* Inspection Date ⓘ

* PV/DG Installation Date ⓘ

Waive Net Metering ⓘ

Restricted Access To Meter Area ⓘ

Application Notes

Design & Construction

Action: Insurance Policy

- For applications with of a particular system size (AC Active Power nameplate Rating > 250 kW), you will be required to provide the relevant Insurance Policy.
- Once you have completed and submitted all required documents, Xcel will review.

Insurance Policy Submit your general liability insurance policy. Insurance requirements are outlined in NM 17.9.568.25. Open Applicant **Action**

Click "Submit" after uploading policy

Upload Insurance Policy

Or drop files

Design & Construction

Action: Witness Test Procedure

- Once you have completed and submitted all required documents, Xcel will review.
- You will have the option to download the Witness Test Procedure document. Xcel will determine whether or not you require a Witness Test Procedure.

Witness Test Procedure	Xcel will identify if a Witness Test is needed for your application. Download the Witness Test Procedure document for more information.	Open	Applicant	<input type="checkbox"/>	Action
------------------------	---	------	-----------	--------------------------	--------

Design & Construction

Action: Witness Test Procedure

- Once you have completed and submitted all required documents, Xcel will review.
- You will have the option to download the Witness Test Procedure document. Xcel will determine whether or not you require a Witness Test Procedure.

Xcel has identified that a Witness Test is needed for your application. Download the Witness Test Procedure document for more information.

Download [Witness Test Procedure](#).



Quick Reference Sheet for Large PV Acceptance/Witness Testing

The following items will typically be verified by Xcel Energy during witness test of a large PV system. **This is not an exhaustive list of all requirements, nor does this replace the required test procedure unique to each system.** Large PV systems are required to meet all state tariff requirements, Xcel Energy Standards for Electric Installation and Use (Blue Book), and all applicable local regulations before being granted permission to operate. Xcel Energy may, while on site, request demonstration of compliance to any of these standards or regulations. If the site is in MN, then, review the latest version of the "MN-Community-Solar-Commissioning-Guidelines" document at XcelEnergy.com for an in-depth review of commissioning and witness test requirements.

The Site/Developer personnel should be qualified for completion of the test. The personnel shall have the proper PPE and tools for execution of the testing. The site should be ready for testing at the scheduled start time.

Close

Click "Close" to exit the action

Design & Construction

Step: Documents Pending (after Engineer reopens actions)

- If an Xcel energy team member has indicated your documents do not meet the proper requirements, the application will move to back to “**Documents Pending**” step.
- A chatter comment will be left detailing the missing requirement.
- The applicant is responsible for providing completed documentation.
- Once the reopened actions are completed, the application will move back to “In Review” step, and the Xcel Engineer will review the updated actions.

Case #: 05368536

Status: Design and Construction

Step: Documents Pending

Sub-Step:

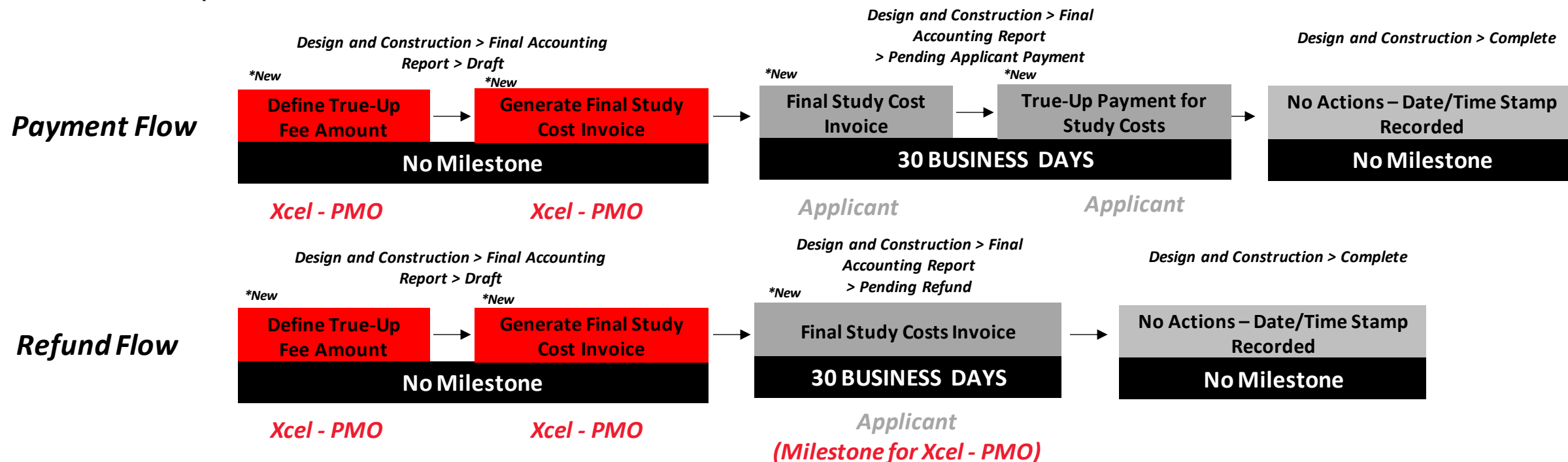
App Owner: Your application is pending submission of the following documents before testing and finalizing your application.

Submit

Design & Construction

Step: Final Accounting Report, Sub-Step: Draft

- For each of the detailed studies conducted, any study fees shall be based on the utility's actual costs and will be invoiced to the applicant after the study is completed.
- The applicant must pay any study costs that exceed the deposit without interest; if the deposit exceeds the invoiced fees, the utility shall refund such excess without interest.
- This payment or refund payment will be deposited prior to an interconnection application reaching the Meter Enrollment process.



Design & Construction

Step: Final Accounting Report, Sub-Step: Pending Refund

- If Xcel has indicated that the applicant is owed a refund, the application will move to Pending Refund step.
- View your Final Study Costs Invoice, which includes the refund amount you will be paid.
- Xcel Energy will provide this refund within 30 days.

Case #: 05368186
 Status: Design and Construction
 Step: Final Accounting Report
 Sub-Step: Pending Refund
 App Owner: Your application is pending a refund payment from Xcel Energy. You will receive payment within 30 business days.

[Submit](#)

[Actions](#)
[Finalized Actions](#)
[Milestones](#)
[Completed Milestones](#)
[Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Final Study Costs Invoice	View your Final Study Costs Invoice	Open	Applicant	<input type="checkbox"/>	Action

[Actions](#)
[Finalized Actions](#)
[Milestones](#)
[Completed Milestones](#)
[Application Details](#)

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
Pending Refund	Your application is pending a refund payment from Xcel Energy. You will receive payment within 30 business days.	Xcel Energy	10/23/2023, 01:00 AM CDT	12/1/2023, 05:30 PM CST

Design & Construction

Step: Final Accounting Report, Sub-Step: Pending Refund

- If Xcel has indicated that the applicant is owed a refund, the application will move to Pending Refund step.
- View your Final Study Costs Invoice, which includes the refund amount you will be paid.
- Xcel Energy will provide this refund within 30 days.



Download the Invoice

**After viewing the invoice,
click "Close"**

Design & Construction

Step: Final Accounting Report, Sub-Step: Pending Refund

- After viewing the Final Study Costs Invoice (optional), click “Submit” to advance the application to the next status.

Case #: 05368186
Status: Design and Construction
Step: Final Accounting Report
Sub-Step: Pending Refund
App Owner: Your application is pending a refund payment from Xcel Energy. You will receive payment within 30 business days.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Final Study Costs Invoice	View your Final Study Costs Invoice	Draft	Applicant	<input type="checkbox"/>	Action

Design & Construction

Step: Final Accounting Report, Sub-Step: Pending Applicant Payment

- If Xcel has indicated that the applicant owes a payment, the application will move to Pending Applicant Payment step.
- View your Final Payment for Study Costs Invoice and pay the True-Up Payment for Study Costs online through Wells Fargo.

Case #: 05368536
 Status: Design and Construction
 Step: Final Accounting Report
 Sub-Step: Pending Applicant Payment
 App Owner: Your application is pending a final true-up payment. Please review your invoice and pay the fee electronically within 30 business days.

[Submit](#)

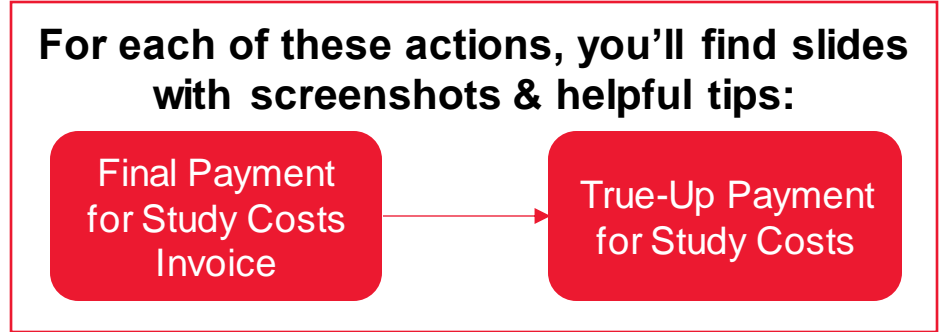
Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Final Payment for Study Costs Invoice	View your Final Payment for Study Costs Invoice.	Open	Applicant	<input checked="" type="checkbox"/>	Action
True-Up Payment for Study Costs	Pay True-Up Payment for Study Costs through online payment to advance your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

After completing all actions, click "Submit"

Actions Finalized Actions **Milestones** Completed Milestones Application Details

TITLE	DESCRIPTION	RESPONSIBLE PARTY	START DATE	DUE DATE
Pending Applicant Payment	Review the Final Payment for Study Costs invoice and electronically pay the fee within 30 business days.	Applicant	7/27/2023, 01:00 AM CDT	9/6/2023, 05:30 PM CDT



Design & Construction

Action: Final Payment for Study Costs Invoice

- After Xcel has generated the Final Payment for Study Costs invoice, you can view it.
- In order to access the invoice, click on the document name and download the document.



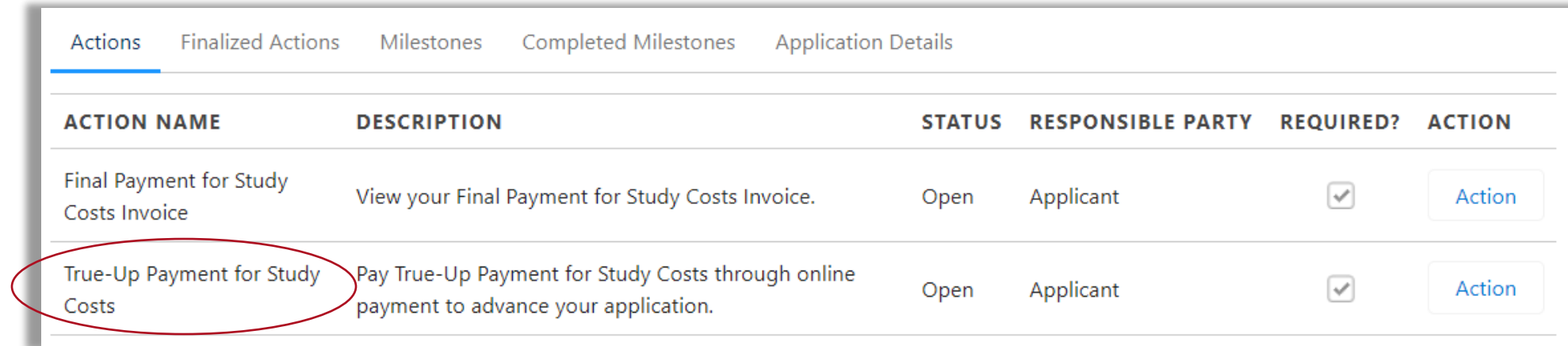
Download the Invoice

**After viewing the invoice,
click "Close"**

Design & Construction

Action: True-Up Payment for Study Costs

- After reviewing the invoice, you will be directed to pay the True-Up Fee amount through Wells Fargo.



The screenshot shows a web application interface with a navigation bar at the top containing 'Actions', 'Finalized Actions', 'Milestones', 'Completed Milestones', and 'Application Details'. Below the navigation bar is a table with the following columns: ACTION NAME, DESCRIPTION, STATUS, RESPONSIBLE PARTY, REQUIRED?, and ACTION. The table contains two rows. The first row is 'Final Payment for Study Costs Invoice' with a description 'View your Final Payment for Study Costs Invoice.', status 'Open', responsible party 'Applicant', and a checked 'REQUIRED?' box. The second row is 'True-Up Payment for Study Costs' with a description 'Pay True-Up Payment for Study Costs through online payment to advance your application.', status 'Open', responsible party 'Applicant', and a checked 'REQUIRED?' box. The 'True-Up Payment for Study Costs' row is circled in red.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Final Payment for Study Costs Invoice	View your Final Payment for Study Costs Invoice.	Open	Applicant	<input checked="" type="checkbox"/>	Action
True-Up Payment for Study Costs	Pay True-Up Payment for Study Costs through online payment to advance your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Helpful Tips:

- Click the "Action" button to pay the Feasibility Study fee.
- You will have 30 business days to pay True-Up Payment Fee.

Design & Construction

Action: True-Up Payment for Study Costs

- If Xcel has indicated that the applicant owes a payment, the application will move to Pending Applicant Payment step.
- View your Final Payment for Study Costs Invoice and pay the True-Up Payment for Study Costs online through Wells Fargo

Please see directions below for online payment. If preferred, fee(s) can always be paid traditionally via check/wire and form.

- Fee invoice(s) are available now on the Wells Fargo payment site.
- The invoice(s) are ready for online payment.
- Fee invoice(s) will not be available on the Wells Fargo payment site until the following day from when applicant arrives at a particular status/step that requires payment (e.g.
- Please be sure to wait 24 hours to submit payment.
- Payments will post to the applicable application ID the day after payment is made to Wells Fargo (another 24 hours).
- Please enter Primary Authorization Code **SR-10937239** and Secondary Authorization Code **321111** to complete online payment with Wells Fargo.
- Primary and Secondary codes are unique to your account. Once an account is set-up, you can use the same codes for each application as needed.
- Credit card payment will not be accepted.

Take note of the computer generated "Primary Authorization Code" and "Secondary Authorization Code".

Payment Details:

Item Description	Invoice Number	Fee Amount Due	Sales Tax Amount Due	Total Amount Due	Due Date	Payment Status
True-Up Payment for Study Costs	05368536-PN-0035529	\$12.00	\$0.59	\$12.59	Nov 15, 2023	Not Paid

Please click the 'Pay Fee Online' button for online payment.

Pay Fee Online

Click "Pay Fee Online"

Design & Construction

Action: True-Up Payment for Study Costs

Wells Fargo payment steps (one-time payment):

- Open "make payment" tab
- Use Primary and Secondary authorization codes
- Authorization codes located within Fee Action

Wells Fargo payment steps (registered):

- Use your login credentials to login into your account
- Your Wells Fargo credentials will differ from your DER portal credentials
- Your invoice will appear in the top right corner

The screenshot shows the Wells Fargo login interface. At the top, there are two tabs: "LOGIN" and "MAKE PAYMENT". Below the "LOGIN" tab, there is a red-bordered box labeled "Registered Users". Below the "MAKE PAYMENT" tab, there is a red-bordered box labeled "One-Time Payments". The login form includes a "Login ID" field, a "Password" field, and a green "Login" button. There are also links for "Forgot your Login ID?" and "Password Help?".

Design & Construction

Step: Final Accounting Report, Sub-Step: Pending Applicant Payment

- Once the True-Up Payment has been paid, click “Submit” to move the application to the next status.

Case #: 05368536
 Status: Design and Construction
 Step: Final Accounting Report
 Sub-Step: Pending Applicant Payment

[Submit](#)

App Owner: Your application is pending a final true-up payment. Please review your invoice and pay the fee electronically within 30 business days.

[Actions](#)
 [Finalized Actions](#)
 [Milestones](#)
 [Completed Milestones](#)
 [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Final Payment for Study Costs Invoice	View your Final Payment for Study Costs Invoice.	Draft	Applicant	<input checked="" type="checkbox"/>	Action
True-Up Payment for Study Costs	Pay True-Up Payment for Study Costs through online payment to advance your application.	Draft	Applicant	<input checked="" type="checkbox"/>	Action

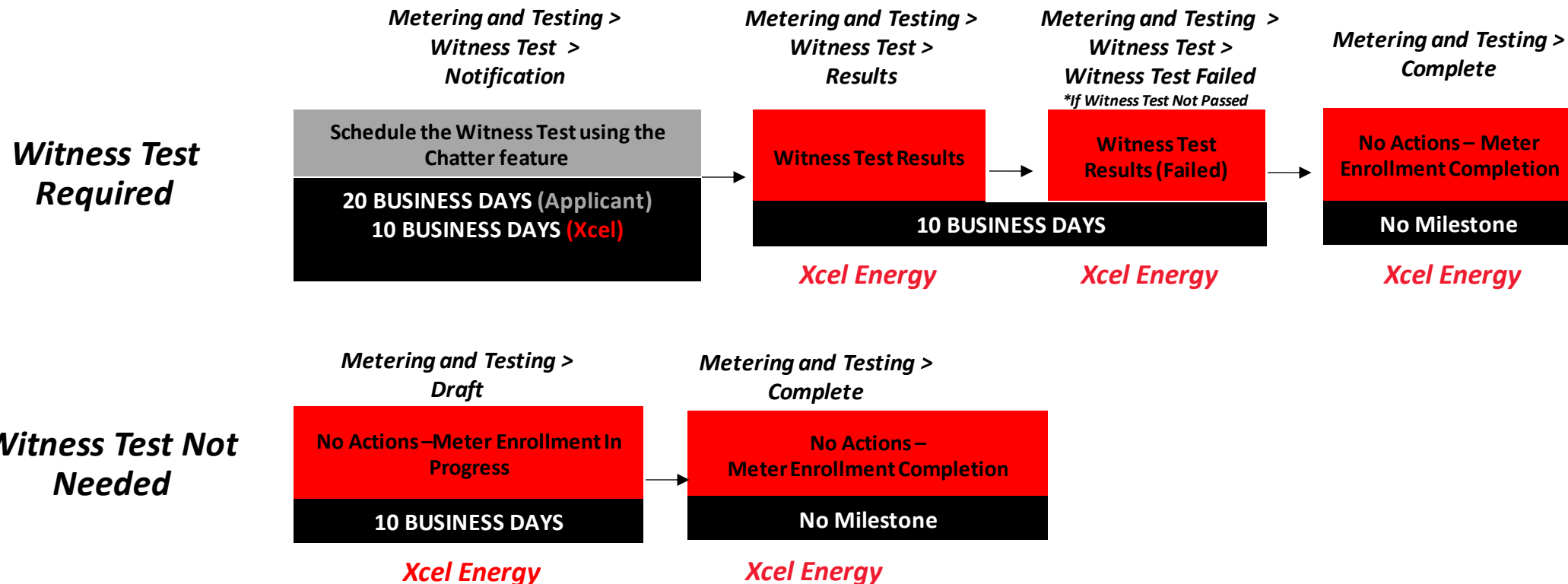
Metering & Testing

Metering & Testing

Process Flow



- During the Metering and Testing status, the Xcel Energy Program team will request the required solar meter(s) if the final documents and Solar Agreements meet program requirements. A meter technician will attempt to install the meter within 10 business days of the Solar Team initiating a meter request.



Metering & Testing

Step: Witness Test

1 Notification: Applicant to Schedule Witness Test

Case #: 05368256
Status: Metering and Testing
Step: Witness Test
Sub-Step: Notification
App Owner: Your application is pending a Witness Test. Please reach out to the program, using the Chatter feature, to schedule a Witness Test.

2 Review: Xcel will review Witness test

Case #: 05368536
Status: Metering and Testing
Step: Witness Test
Sub-Step: Results
App Owner: Xcel Energy to conduct Witness Test. If the Witness Test has passed, your application will move forward, and Permission to Operate will be granted.

3 Results: Xcel will indicate whether the test has passed or failed

Case #: 05368536
Status: Metering and Testing
Step: Witness Test
Sub-Step: Results
App Owner: Xcel Energy to conduct Witness Test. If the Witness Test has passed, your application will move forward, and Permission to Operate will be granted.

4 Witness Test Failed: If Xcel indicated a failed test, you must re-schedule (refer to Witness Test Documentation in Witness Test Procedure Finalized Action)

Case #: 05368536
Status: Metering and Testing
Step: Witness Test
Sub-Step: Witness Test Failed
App Owner: Xcel Energy has indicated your Witness Test has failed, and will be rescheduled. Refer to "Witness Test Documentation."

5 Complete: You will then move into the next status: Permission to Operate

Case #: 05368536
Status: Metering and Testing
Step: Complete
Sub-Step:
App Owner: Testing is complete. Xcel Energy to complete application meter information and grant Permission to Operate.

Metering & Testing

Witness Test Procedure

1

Status: Design & Construction, Step: Documents Pending

Applicant to review "Acceptance Testing Procedure" Document

2

Status: Design & Construction, Step: Verify

Xcel Engineer(s) to indicate if a Witness Test is needed

3

Status: Metering & Testing, Step: Notification

Applicant to schedule a Witness Test using the Chatter feature

4

Status: Metering & Testing, Step: Results

Xcel to perform a Witness Test and review the results and indicate Pass or Fail

5

Status: Metering & Testing, Step: Witness Test Failed

Applicant to Reschedule the Witness Test (using the Chatter feature) and Xcel to perform a Witness Test again.

6

Status: Metering & Testing, Step: Complete

Xcel has indicated the Witness Test has passed.

Metering & Testing

Step: Witness Test, Sub-Step: Notification

- If Xcel has determined that a Witness Test is needed, your application will move to this Witness Test step and Notification sub-step.
- Use the Chatter feature to schedule the test within 20 business days of reaching this step.

Case #: 05368536

Status: Metering and Testing

Step: Witness Test

Sub-Step: Notification

App Owner: Your application is pending a Witness Test. Please reach out to the program, using the Chatter feature, to schedule a Witness Test.

Submit

Click "Submit"

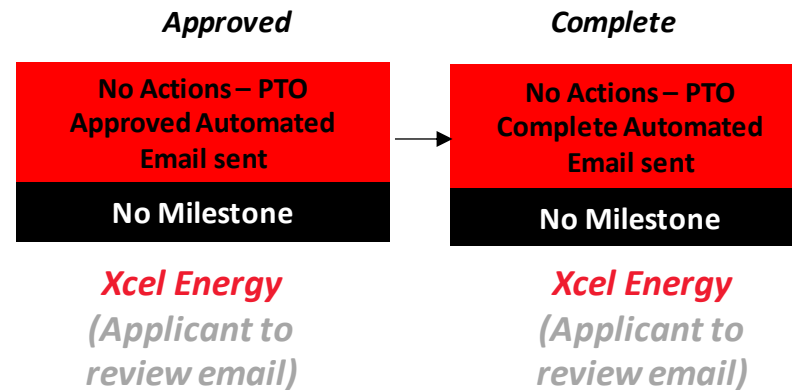
Actions	Finalized Actions	Milestones	Completed Milestones	Application Details
Schedule Witness Test		Schedule a witness test with Xcel Energy within 20 business days	Applicant	11/16/2023, 01:00 AM CST 11/16/2023, 04:13 PM CST

Permission to Operate

Permission to Opera

Process Flow

- Once the meter has been enrolled, you will move to the Permission to Operate status.
- After you receive an email granting Permission to Operate, your application will be moved to the Complete step during which you will receive an email confirming your application is complete.
- There is no action needed on the portal by Xcel Energy nor the Applicant at this point in the application process, both emails are sent to the applicant.



Permission to Operate

Step: Approved

- Once the meter has been enrolled, you will now be in the Approved step of the Permission to Operate status.
- After you receive an email granting Permission to Operate, your application will be moved to the Complete step.

Case #: 04109022

Status: Permission to Operate

Step: Approved

Sub-Step:

App Owner: Permission to Operate (PTO) validation is in progress. You should receive a PTO authorization notice via email shortly. Xcel Energy: Send PTO validation.

Submit

Helpful Tips:

- Reference following slide to understand PTO authorization notices.

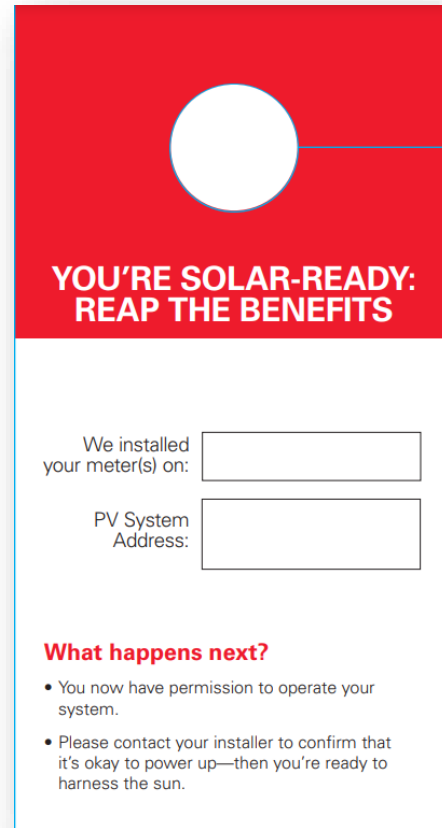
Permission to Operate

Step: Approved

PTO will be provided in two ways:

1

A door hanger will be left by the Xcel Energy meter tech once the solar metering inspection is complete.



**YOU'RE SOLAR-READY:
REAP THE BENEFITS**

We installed your meter(s) on:

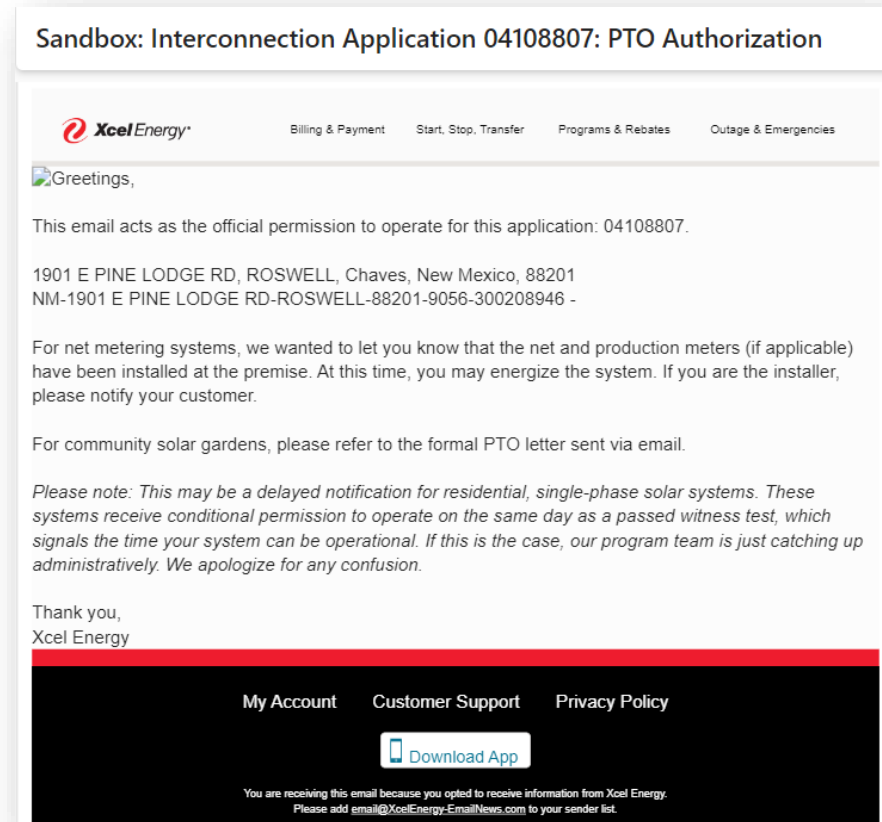
PV System Address:

What happens next?

- You now have permission to operate your system.
- Please contact your installer to confirm that it's okay to power up—then you're ready to harness the sun.

2

The customer will receive an email providing permission to operate once the meter orders are completed in the application.



Sandbox: Interconnection Application 04108807: PTO Authorization

Xcel Energy Billing & Payment Start, Stop, Transfer Programs & Rebates Outage & Emergencies

Greetings,

This email acts as the official permission to operate for this application: 04108807.

1901 E PINE LODGE RD, ROSWELL, Chaves, New Mexico, 88201
NM-1901 E PINE LODGE RD-ROSWELL-88201-9056-300208946 -

For net metering systems, we wanted to let you know that the net and production meters (if applicable) have been installed at the premise. At this time, you may energize the system. If you are the installer, please notify your customer.

For community solar gardens, please refer to the formal PTO letter sent via email.

Please note: This may be a delayed notification for residential, single-phase solar systems. These systems receive conditional permission to operate on the same day as a passed witness test, which signals the time your system can be operational. If this is the case, our program team is just catching up administratively. We apologize for any confusion.

Thank you,
Xcel Energy

[My Account](#) [Customer Support](#) [Privacy Policy](#)

[Download App](#)

You are receiving this email because you opted to receive information from Xcel Energy. Please add email@XcelEnergy-EmailNews.com to your sender list.

Permission to Operate

Step: Complete

- Once you have received PTO authorization from Xcel, you have successfully completed and finished your application.
- No further actions are required at this time.
- The Complete email is sent to the applicant during this step, there is no action needed by Xcel Energy nor the Applicant at this point in the application process.
- Please email SolarProgramNM@xcelenergy.com if you make any changes or would like to decommission your PV system

Case #: 05368536

Status: Permission to Operate

Step: Complete

Sub-Step:

App Owner: Your application is complete. No further steps need to be taken at this time. Please reach out to SolarProgramNM@xcelenergy.com if you make changes to or decommission your PV system.

[External] Sandbox: Interconnection Application 04108807: Application Complete

🔒 Internal Information

 Xcel Energy

[Billing & Payment](#)

[Start, Stop, Transfer](#)

[Programs & Rebates](#)

[Outage & Emergencies](#)

 Greetings,

The final accounting has been reconciled for application [04108807](#), which means this application is officially complete. [Congratulations!](#)

If you have any further questions about this completed application or other in-progress applications, please reach out to: solarprogramm@xcelenergy.com

Thank you,
Xcel Energy

[My Account](#)

[Customer Support](#)

[Privacy Policy](#)

 Download App

You are receiving this email because you opted to receive information from Xcel Energy.
Please add email@XcelEnergy-EmailNews.com to your sender list.

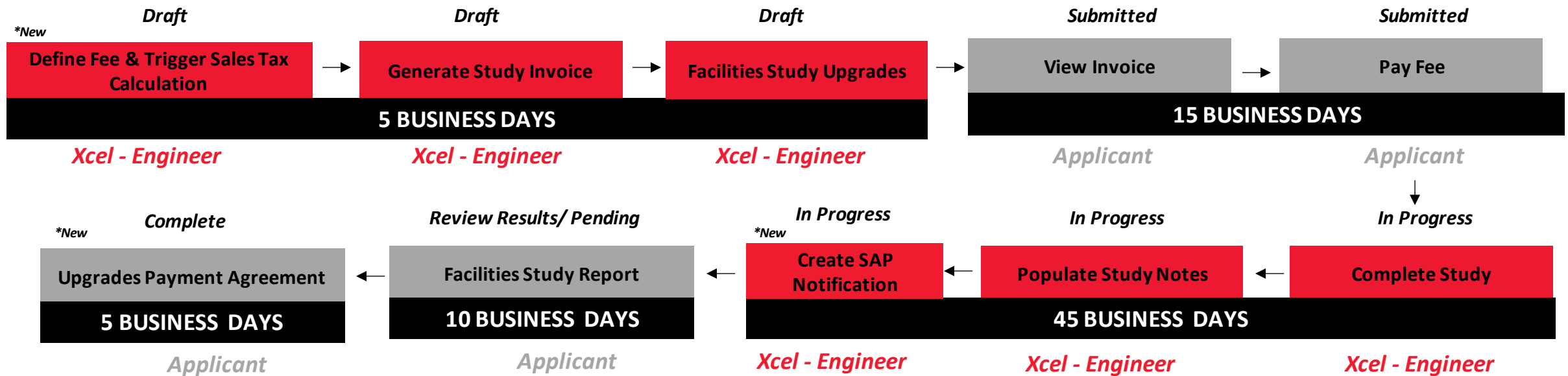
Appendix: Upgrades Required

Upgrades Required

Process Flow - Status: Facilities Study



- If Upgrades are required for an Interconnection Application, Xcel Energy will identify this requirement during the Facilities Study Upgrades action triggered under the 'Draft' step of the Facilities Study status.
- If Upgrades are required, the Create SAP Notification action will be triggered within the 'In Progress' step.



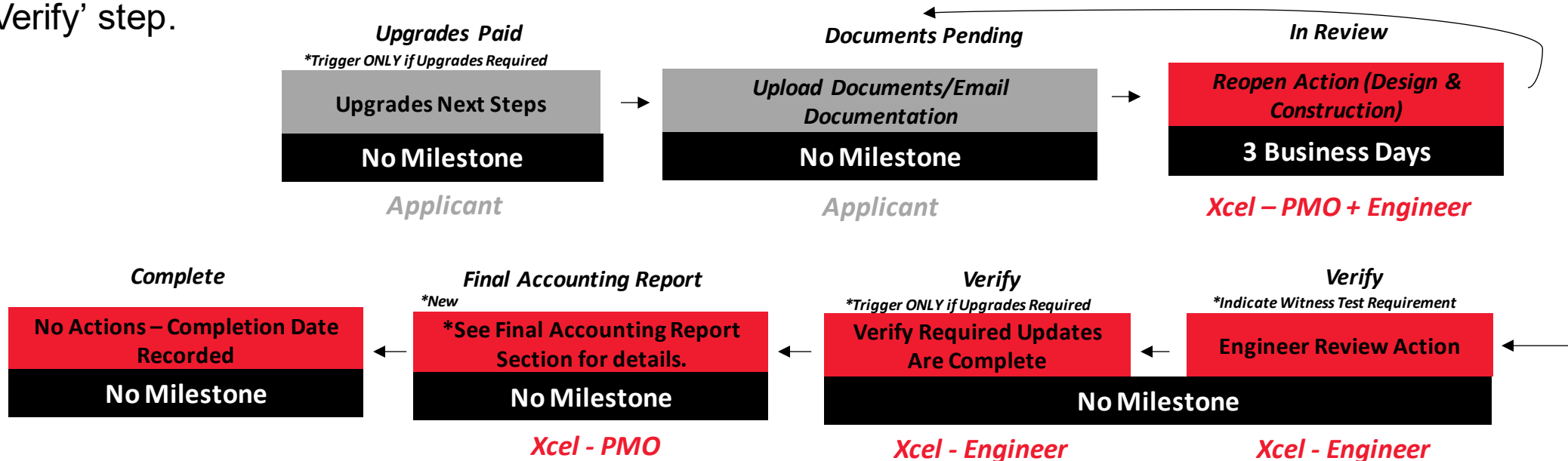
Note: the above describes the Facilities Study process for applications which require upgrades. If upgrades are not required, there are slight nuances to the process (i.e., decreased study time duration, step changes) that can be seen in more detail at the end of the Facilities Study section.

Upgrades Required

Process Flow – Status: Design and Construction



- If Upgrades are required for an Interconnection Application, Xcel Energy will identify this requirement under during the Facilities Study Upgrades action within the Facilities Study status.
- If upgrades are required, the ‘Upgrades Paid’ will be the first step triggered under the Design and Construction status; if upgrades are not required, the ‘Upgrades Paid’ step is not triggered for the application.
- If Upgrades are required, the Verify Required Updates Are Complete action will be triggered within the ‘Verify’ step.



Facilities Study

Step: Complete; Action: Upgrades Payment Agreement

- To move the application forward from the Facilities Study, agree to pay for the interconnection facilities or the upgrades identified.

Upgrades Payment Agreement

*Do you agree to pay for the Interconnection Facilities or Upgrades identified for this application?

--None--

As indicated in section 17.9.568.18 of the NM Interconnection Rule, upon completion of the facilities study, the interconnection applicant must agree to pay for interconnection facilities or upgrades identified in the study prior to the utility providing the interconnection applicant with an executable interconnection agreement.

Submit

After completing required fields, click "Submit"

Note: the "Upgrades Payment Agreement" action will only be triggered if upgrades are required for the application.

Facilities Study

Step: Complete

- To move the application forward from the Facilities Study, agree to pay for the interconnection facilities or the upgrades identified.

Case #: 05368539
Status: Facilities Study
Step: Complete
Sub-Step:
App Owner: Applicant to choose next step to move your application forward. Your Facilities Study is complete and the Interconnection Agreement will be issued by Xcel Energy within approximately 5 business days after you agree to pay for interconnection facilities or upgrades identified. Xcel Energy: Revise Facilities Study within 15 business days if comments, or generate Interconnection Agreement if applicant moves application forward.

*** Choose the Next Step**

Proceed with upgrades identified in the Facilities Study. Xcel Energy to provide Interconnection Agreement.

Withdraw application.

Submit

Next

After completing required Actions, click "Submit" and choose the next step.

Design & Construction

Step: Upgrades Paid

- If your application requires upgrades, you will need to confirm whether you have paid for them during the Design & Construction status.

Case #: 05368539
Status: Design and Construction
Step: Upgrades Paid
Sub-Step:
App Owner: Indicate whether you have paid for upgrades.

Submit

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Upgrades Next Steps	Please indicate whether you have paid for upgrades required. If you'd like to withdraw the application, please click the "Withdraw" button on the main portal screen.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Design & Construction

Step: Upgrades Paid; Action: Upgrades Next Steps

- If your application requires upgrades, you will need to confirm whether you have paid for them during the Design & Construction status.
- You must confirm payment for upgrades required in order to proceed with your application.

Initial Review Results

*Have you paid for upgrades required?

--None--

Submit

Design & Construction

Step: Upgrades Paid; Action: Upgrades Next Steps

- If your application requires upgrades, you will need to confirm whether you have paid for them during the Design & Construction Phase.
- You must confirm payment for upgrades required in order to proceed with your application.

Initial Review Results

*Have you paid for upgrades required?

--None--

Submit

Next Steps

You must confirm payment for upgrades required in order to proceed with your application. If you'd like to withdraw the application, please click the "Withdraw" button on the main portal screen.

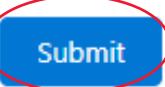
If payment has not been confirmed, and "No" is selected you will receive this error and Action will remain open until you confirm

Design & Construction

Step: Upgrades Paid

- After you have confirmed upgrades have been paid, you will be able to move your application forward to the 'Documents Pending' Step.

Case #: 05368539
Status: Design and Construction
Step: Upgrades Paid
Sub-Step:
App Owner: Indicate whether you have paid for upgrades.

Click "Submit" → 

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Upgrades Next Steps	Please indicate whether you have paid for upgrades required. If you'd like to withdraw the application, please click the "Withdraw" button on the main portal screen.	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Appendix: Solar* Rewards Community

NM DG vs. S*RC Differences Overview

Note: as described below, there are very few process differences from DG after Initiate Application. Please refer to the respective DG sections for step-by-step guidance for those similar sections.

Status	Program Difference?	Detailed Program Difference
Pre-Application	Yes	2 additional submission fields for S*RC
Initiate Application	Yes	Different action requirements for S*RC
Engineering Screens	No	
Supplemental Review	No	
Feasibility Study	No	
System Impact Study	No	
Facilities Study	No	
Transmission Impact Study	No	
Interconnection Agreement	Yes	Always required for S*RC
Design & Construction	No	
Metering & Testing	Yes	CRS Integration is NOT enabled for S*RC, and Witness Test is always required
Permission to Operate	No	
Material Modification Review	No	

Note: Please refer to the respective DG sections for step-by-step guidance for the Initiate Application Status.

Application Submission

Application Types: PADR OR Application

- In NM, the S*RC Program approval selection process is owned by a Third-Party Admin.
- Applicants can initiate the creation of an S*RC Application after to the approval selection process. The Initiation of an Application requires a Bid ID Number and Queue Rank Number that will be provided by the Third-Party admin to the applicant.

1

SELECT SOLAR*REWARDS COMMUNITY PROGRAM TYPE AND CLICK "NEXT."

Application New Fields - S*RC Program

NEW *S*RC Bid Number

NEW *S*RC Queue Rank

***NOT APPLICABLE FOR DG**

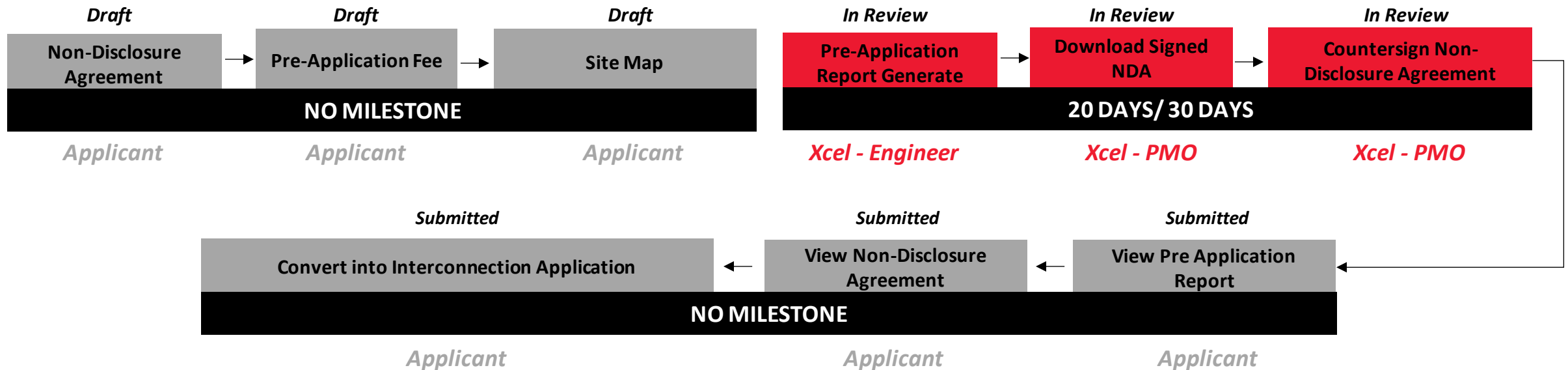
2

Status: Pre-Application

Note: Please refer to the respective **PADR section** for step-by-step guidance for the Pre-Application Status.

All Program Types

- In NM, for all Programs, all applicants can undergo this optional status to submit a pre-application data request; once the pre-application report is conducted, the applicant will have the option to convert their request into an Interconnection Application.



Status: Pre-Application

Note: Please refer to the respective DG sections for step-by-step guidance for the Initiate Application Status.

All Program Types

- In NM, for all Programs, all applicants can undergo this optional status to submit a pre-application data request; once the pre-application report is conducted, the applicant will have the option to convert their request into an Interconnection Application.

Case #: 05368553
Status: Pre-Application
Step: Submitted
Sub-Step:
App Owner: Your Pre-Application Report is ready for review. To proceed with an interconnection application, follow the provided steps.

Submit

Actions Finalized Actions Milestones Completed Milestones

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Convert into Interconnection Application	Provide Interconnection application details.	Open	Applicant	<input checked="" type="checkbox"/>	Action
View Non-Disclosure Agreement	View the Countersigned Non-Disclosure Agreement	Open	Applicant	<input type="checkbox"/>	Action
View Pre-Application Report	Your Pre-Application Report is available for download.	Open	Applicant	<input type="checkbox"/>	Action

All Program Types

SSS: Pre-Application/Draft

*Site Map

*Non-Disclosure Agreement

*Pre-Application Fee

SSS: Pre-Application/In Review

*Pre-Application Report Generate

*Download Signed NDA

*Countersign NDA

SSS: Pre-Application/Submitted

*Convert to Application

View Pre Application Report

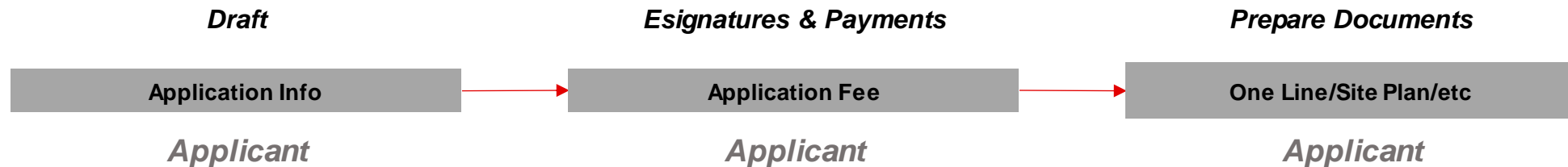
View Non-Disclosure Agreement

Status: * Initiate Application

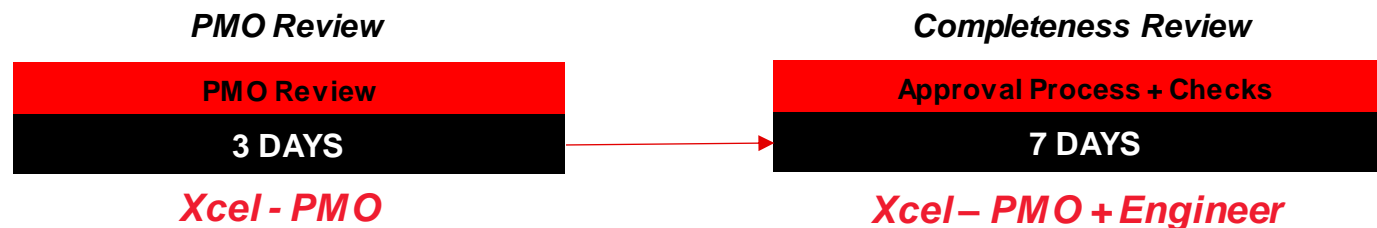
All Program Types – Process Flow

Note: Please refer to the respective DG sections for step-by-step guidance for the Initiate Application Status.

After creating your application, you will be prompted to complete a series of actions in the Initiate Application status.



Once you complete the actions for each of the three above steps, you will be able to submit your application to Xcel Energy for review.



Note: Solar*Rewards Community program applications will NOT trigger the Battery Details action nor the 120% rule validation nor the 120% Rule Documentation action. See next slide for details.

Tasks for Applicant

Note: Please refer to the respective DG sections for step-by-step guidance for the Initiate Application Status.

Status: * Initiate Application

Step: Draft; Program Differences

- After creating an application or converting a PADR application, the applicant will be in the “Draft” step of the Initiate Application status.
- The applicant will then be prompted to enter contact information, system and application details.

Case #: 05367228
Status: Initiate Application
Step: Draft
Sub-Step:
App Owner: Please enter contact information, system and application details, and other ancillary actions before continuing.

[Save & Continue](#)

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Application Details	Please complete supplemental fields to complete your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Contact Information	Please provide information about the contacts associated with your application.	Draft	Applicant	<input checked="" type="checkbox"/>	Action
System Details	Please provide system details associated with your application	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Please see Milestones tab for deadline.

Program Type = S*RC

*Contact Information

*System Details

*Application Details

Program Type = DG

*Contact Information

*System Details

*Application Details

*Battery Details

120% Rule Documentation

Note: See next 3 slides for details on the Solar*Reward program application differences within the “Contact Information”, “System Details” and “Application Details” actions.

Tasks for Applicant

Note: Please refer to the respective DG section for step-by-step guidance for the Contact Information action.

Status: * Initiate Application

Action: Contact Information; Program Differences

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Contact Information	Please provide information about the contacts associated with your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Note: Solar*Rewards Community program applications will NOT ask the applicant to populate the Account Number nor Premise Number to enter contact information details.

Status: * Initiate Application

Action: System Details; Program Differences

System Details	Please provide system details associated with your application	Open	Applicant	<input checked="" type="checkbox"/>	Action
----------------	--	------	-----------	-------------------------------------	--------

Note: Solar*Rewards Community program applications **will NOT display the site details screens, will NOT have a 120% rule validation and will NOT display the generator equipment screen.** See next slides for step-by-step guidance for the System Details action under the Initiate Application Status for Solar*Rewards Community program applications.

Status: *Initiate Application

Action: System Details

If DER Type = Solar PV, Diesel, Wind, Hydro, Natural Gas, Biomass, Bio-gas, or Geothermal, the following Site Details fields will be available:

- **Estimated Project Cost:** enter the estimated project cost as accurately as possible.
- **System Inverter Phase:** indicate if the proposed system will be one phase or three phase
- **CT Cabinet Needed:** if the proposed system will require a CT cabinet, choose yes. CT cabinets are only required for larger systems (typically 100 kw dc and above).
- **System Replacement & Expansion:** if the system is a replacement and expansion of the existing system, check this box.

System Details

* Estimated Project Cost

Enter a positive dollar amount. Click back into this field to make your updates.

* System Inverter Phase
--None--

CT Cabinet Needed ⓘ

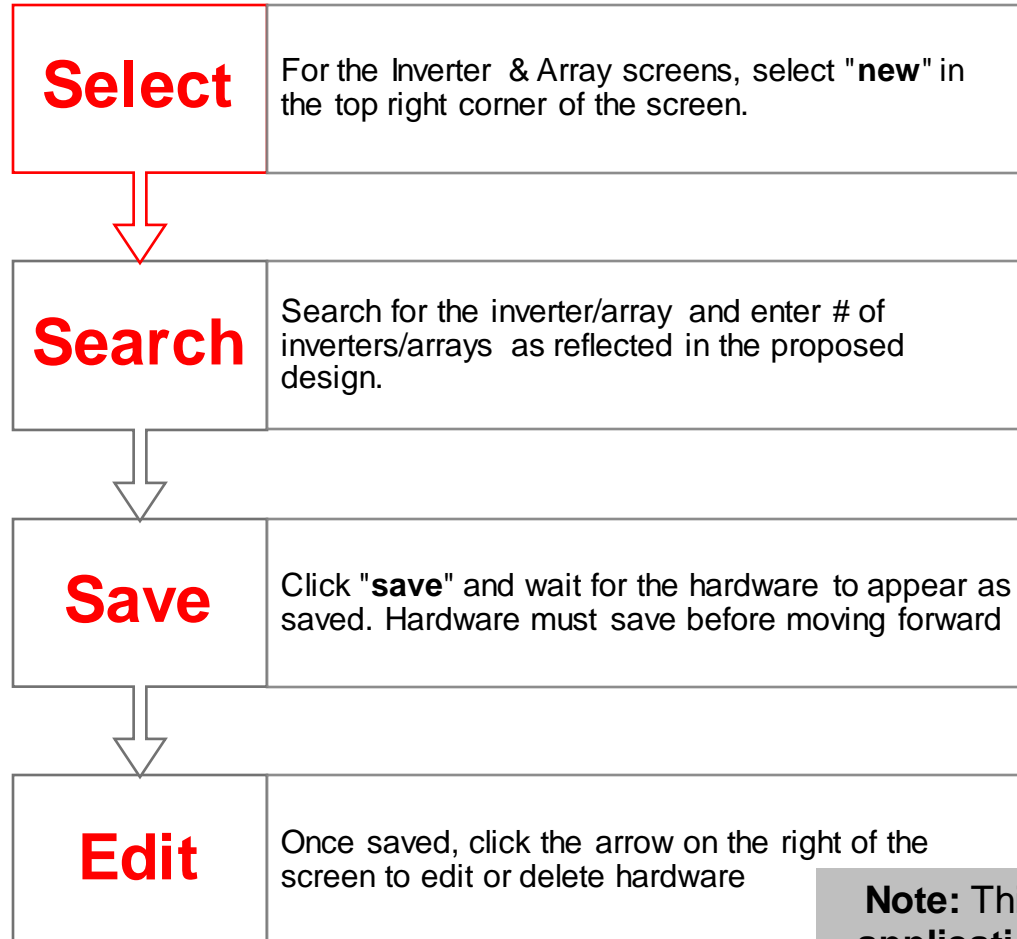
System Replacement & Expansion

If CT Cabinet Needed = "Yes", Xcel Engineer will receive an email notification.

Note: This example shows specific requirements for a Solar*Rewards Community application. Requirements for other programs will vary. For more details/screenshots for Distributed Generation application, please see the Initiate Application section.

Status: * Initiate Application

Action: System Details



Inverter Details

Manufacturer | Model Number | Power Rating (kW) | Number of Inverters

New

New Inverter Details

Hardware

Search Hardware...

Number of Inverters

Save

Back | Next

The # of Arrays must be greater than or equal to the # of Inverters

Manufacturer	Model Number	Power Rating (kW)	Number of Inverters	
SolarEdge Technologies Ltd.	SE5000H-US [240V]	5.054	1.000	New Edit Delete

Note: This example shows specific requirements for a Solar*Rewards Community application. Requirements for other programs will vary. For more details/screenshots for Distributed Generation application, please see the Initiate Application section.

Status: * Initiate Application

Action: System Details

- The summary screen will reflect the hardware entered/saved.
- Review this screen carefully
- Click "**next**" if this information is correct.
- You may edit your hardware by clicking "**back**" if changes need to be made.

Summary

Number Of Panels
10.00

Number of Inverters
10

DC Nameplate Rating (kW)
4.00

AC Active Power Nameplate Rating (kW)
59.9

System PV Watts (kWh)
4,466.429

Status: *Initiate Application

Application Details Action; Program Differences

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Application Details	Please complete supplemental fields to complete your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Note: Solar*Rewards Community program applications will **NOT display certain screens and fields displayed for the Distributed Generation program applications.** See next slides for step-by-step guidance for the System Details action under the Initiate Application Status for Solar*Rewards Community program applications.

Status: * Initiate Application

Action: Application Details – Standard Interconnection Application Screen

Standard Interconnection Application

* Apparent Power AC Nameplate Rating (kVAac) ⓘ

* Nameplate rating: (AC Volts) ⓘ

* Prime Mover ⓘ

--None--

Photovoltaic

Microturbine

Reciprocating Engine

Fuel Cell

Gas Turbine

Steam Turbine

Wind Turbine

Other (State Type)

Next

Additional fields may be available/required based on the below conditions:

Field	Field Trigger Condition
Other	If Prime Mover == "Other (State Type)"

Note: This example shows specific requirements for a Solar*Rewards Community application. Requirements for other programs will vary. For more details/screenshots for Distributed Generation application, please see the Initiate Application section.

Status: * Initiate Application

Action: Application Details – Standard Interconnection Application (2nd Screen)

Additional fields may be available/required based on the below conditions:

Field	Field Trigger Condition
Summer Nameplate Kw	If Does DER have different summer and winter ratings? == "Yes"
Summer Nameplate kVA	If Does DER have different summer and winter ratings? == "Yes"
Winter Nameplate kW	If Does DER have different summer and winter ratings? == "Yes"
Winter Nameplate kVA	If Does DER have different summer and winter ratings? == "Yes"

Does DER have different summer and winter ratings?

Yes No

Summer Nameplate kW

Summer Nameplate kVA

Winter Nameplate kW

Winter Nameplate kVA

[Back](#)

Status: *Initiate Application

Action: Application Details – Standard Interconnection Application (3rd Screen)

The screenshot displays a web form titled "Standard Interconnection Application". At the top left, there is a label "Power Factor" with an information icon. Below it is a dropdown menu currently showing "--None--". To the left of the dropdown is a blue "Back" button, and to the right is a blue "Next" button. A red arrow points from the dropdown menu in the main form to a larger, detailed view of the dropdown menu on the right. This detailed view shows the following options: "--None--", "--None--" (highlighted in blue), "Leading (absorbing vars)", "Lagging (injecting vars)", and "Unity".

Note: This example shows specific requirements for a Solar*Rewards Community application. Requirements for other programs will vary. For more details/screenshots for Distributed Generation application, please see the Initiate Application section.

Status: * Initiate Application

Action: Application Details – Standard Interconnection Application (4th Screen)

* Will a transformer be used between the DER and the Point of Common Coupling?

Yes No

Enter/Select a valid value.

* Customer-owned Fuse?

Yes No

* Customer-owned Circuit Breaker?

Yes No

Additional fields may be available/required based on the below conditions:

Field	Field Trigger Condition
*Customer Transformer Phase	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
*Customer Transformer kVA Base	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
*Customer Transformer Impedance (%)	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Customer Transformer kVA Base	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Primary Winding	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Primary Voltage	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Secondary Winding	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Secondary Voltage	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Teriary Winding	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"
Transformer Teriary Voltage	If Will a transformer be used between the DER and the Point of Common Coupling? == "Yes"

Note: This example shows specific requirements for a Solar*Rewards Community application. Requirements for other programs will vary. For more details/screenshots for Distributed Generation application, please see the Initiate Application section.

Status: * Initiate Application

Action: Application Details – Standard Interconnection Application (4th Screen)

Additional fields may be available/required based on the below conditions:

Field	Field Trigger Condition
Fuse Manufacturer	If Customer-owned Fuse? == "Yes"
*Fuse Type	If Customer-owned Fuse? == "Yes"
*Fuse Size	If Customer-owned Fuse? == "Yes"
Fuse Speed	If Customer-owned Fuse? == "Yes"
*Breaker Manufacturer	If Customer-owned Circuit Breaker == "Yes"
*Breaker Type	If Customer-owned Circuit Breaker == "Yes"
*Breaker Continuous Rating	If Customer-owned Circuit Breaker == "Yes"
*Breaker Interrupting Rating	If Customer-owned Circuit Breaker == "Yes"
Breaker Trip Speed	If Customer-owned Circuit Breaker == "Yes"

* Will a transformer be used between the DER and the Point of Common Coupling?

Yes No

Enter/Select a valid value.

Customer-owned Fuse?

Yes No

* Customer-owned Circuit Breaker?

Yes No

Note: This example shows specific requirements for a Solar*Rewards Community application. Requirements for other programs will vary. For more details/screenshots for Distributed Generation application, please see the Initiate Application section.

Status: * Initiate Application

Action: Application Details – Standard Interconnection Application (5th Screen)

The screenshot shows a web form with three main sections. The first section is titled '* Interconnection Protective Relays Used?' and contains two buttons: 'Yes' and 'No'. This section is circled in red. Below it is a red error message: 'Enter/Select a valid value.' The second section is titled 'External Current or Potential Transformer Used?' and contains two buttons: 'Yes' and 'No'. The third section is titled 'List of adjustable set points for the protective equipment or software' and contains a large empty text input field.

Additional fields may be available/required based on the below conditions:

Field	Field Trigger Condition
*Relay Type	If Interconnection Protective Relays Used? == "Yes"
Is the prime mover compatible with the certified protective relay package?	If Interconnection Protective Relays Used? == "Yes"

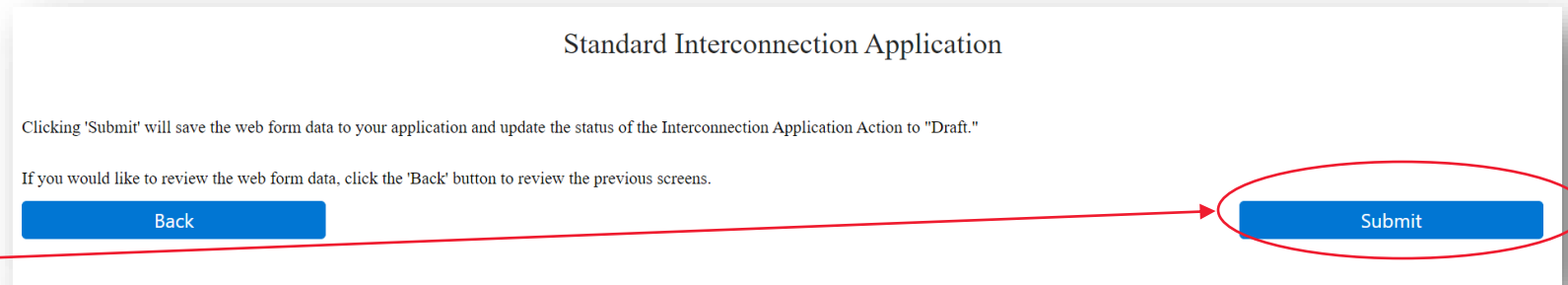
Note: This example shows specific requirements for a Solar*Rewards Community application. Requirements for other programs will vary. For more details/screenshots for Distributed Generation application, please see the Initiate Application section.

Status: * Initiate Application

Action: Application Details

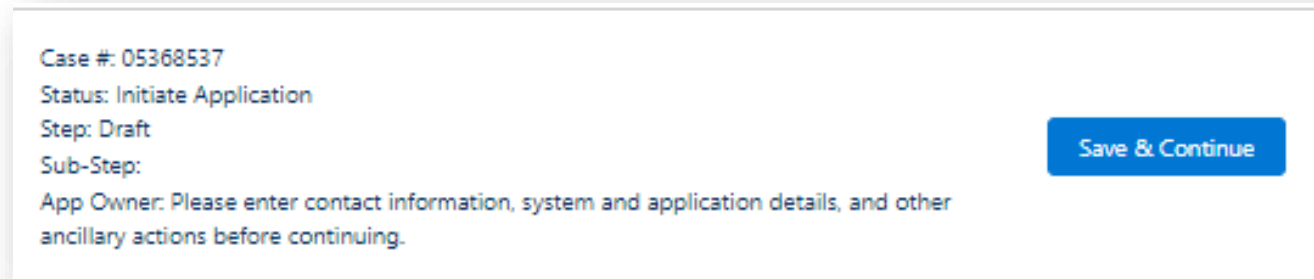
1

After completing the "Application Details" Action, click "Submit".



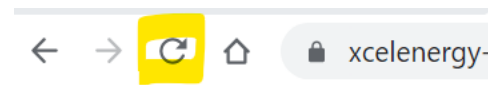
2

Return to the IA page,



3

...and refresh.



Note: Please refer to the respective DG sections for step-by-step guidance for the Initiate Application Status.

Status: * Initiate Application

Step: eSignature & Payments; Program differences

- After clicking 'Save & Continue' in Initiate Application/Draft, the applicant will be in the eSignature & Payments step of the Initiate Application status.
- The applicant will then be prompted to eSign the Standard Application Form and pay the Application Fee the application fee is defined by the rules based on the program type and project size.

Case #: 05367228
Status: Initiate Application
Step: Esignatures and Payments
Sub-Step:
App Owner: Please submit payment and sign all required eSignature documents (sent via email) to advance your application to the next steps. Please view submitted information associated with your application in the Application Details tab.

[Save & Continue](#)

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Application Fee	Please pay the Application Fee through online payment to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Initiate Application Esign	Please check your email and sign all required eSignature documents to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Program Type = S*RC

- *Standard Application eSignature
- *Application Fee

Program Type = DG

- *Standard Application eSignature
- *Application Fee
- *SGIA Application eSignature

Note: Solar*Rewards Community program applications will have different application fee amount requirements. See next slide for Solar*Rewards Community program applications application fee requirements.

Status: * Initiate Application

Action: Application Fee

- After clicking 'Save & Continue' in Initiate Application/Draft, the applicant will be in the eSignature & Payments step of the Initiate Application status.
- The applicant will then be prompted to eSign the Standard Application Form and pay the Application Fee the application fee is defined by the rules based on the program type and project size.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Application Fee	Please pay the Application Fee through online payment to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action

AC Active Power Nameplate Rating	Application Fee Amount
< or = 25kW	\$150.00
> 25kW and < or = 100kW	\$300.00
> 100kW	\$300.00 + \$1.00 per kW

Note: This example shows specific requirements for a Solar*Rewards Community application. Requirements for other programs will vary. For more details/screenshots for Distributed Generation applications, please see the Initiate Application section.

Tasks for Applicant

Note: Please refer to the respective DG sections for step-by-step guidance for the Initiate Application Status.

Status: * Initiate Application

Step: Prepare Documents; Program Differences

- After clicking 'Save & Continue' in Initiate Application/E-signatures & Payments, the applicant will be in the Prepare Documents step of the Initiate Application status.
- The applicant will then be prompted to upload the following documents:

Case #: 05153008
Status: Initiate Application
Step: Prepare Documents
Sub-Step:
App Owner: Your application is pending submission upon uploading the required engineering documents. You have 30 days to complete this step and can save your draft application at any time and return to it later. Please make sure to complete all application requirements prior to finalizing and submitting for review. For more information, visit: <https://wi.my.xcelenergy.com/s/renewable/developers/interconnection>

Submit

Actions Finalized Actions Milestones Completed Milestones Application Details

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
One-Line Diagram	Show the installation of the DER system and associated equipment required within your interconnection application.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Site Plan	Show the location plan identifying location of equipment noted on the one-line.	Open	Applicant	<input checked="" type="checkbox"/>	Action

All Program Types

*One Line Diagram

*Site Plan

Specifications Sheet(s)

*Proof of Site Control

*Annotated Aerial Map

*Operation of Protections and Control Schemes

*Fuse Curves

Only for DG Program Type

*Manufacturer's Excitation & Ratio Correction Curves

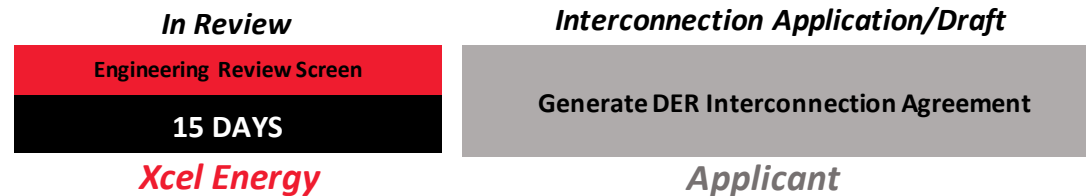
*Block Diagram

Note: Please refer to the respective **DG sections** for step-by-step guidance for the Engineering Screens Status.

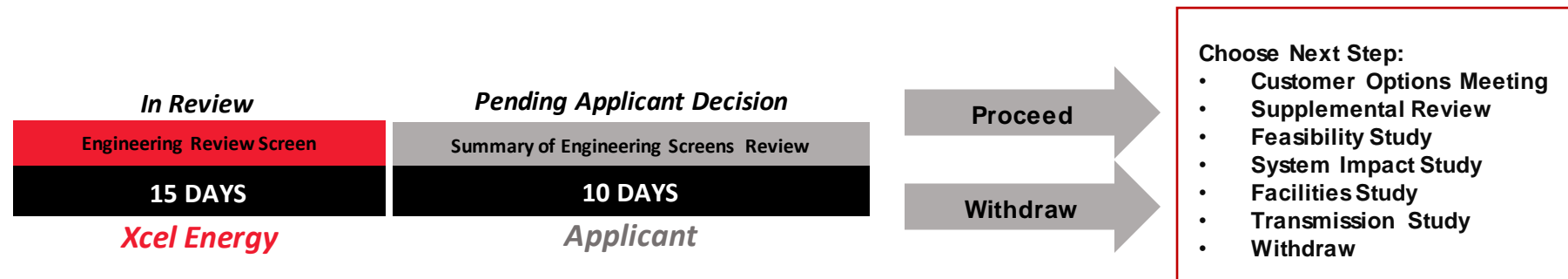
Status: * Engineering Screens

All Program Types

- In NM, for all programs, all interconnection applications must undergo this review of the application conducted by the electric provider, to determine if an engineering review or system impact study is needed.
- If the application is deemed “Safe and Reliable for Interconnection”, the status will move to Interconnection Application.



- If the application requires further review, the step will move to Pending Applicant Decision. The applicant will be asked whether they would like to proceed or withdraw their application.

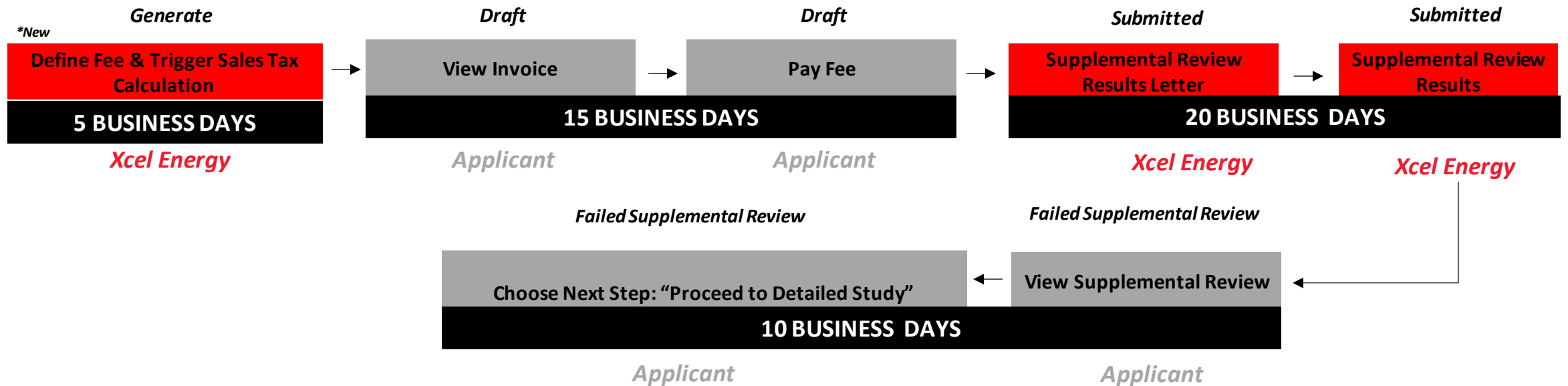


Note: Please refer to the respective DG sections for step-by-step guidance for the Supplemental Review Status.

Status: Supplemental Review

All Program Types

- In NM, for all programs that require a supplemental review, this is an additional engineering evaluation to determine if a generating facilities can be interconnected following the (simplified or fast track) process without the need for detailed study.
- Following the first failed Supplemental Review, the option to Redesign and Resubmit an Application must be offered to the applicant.

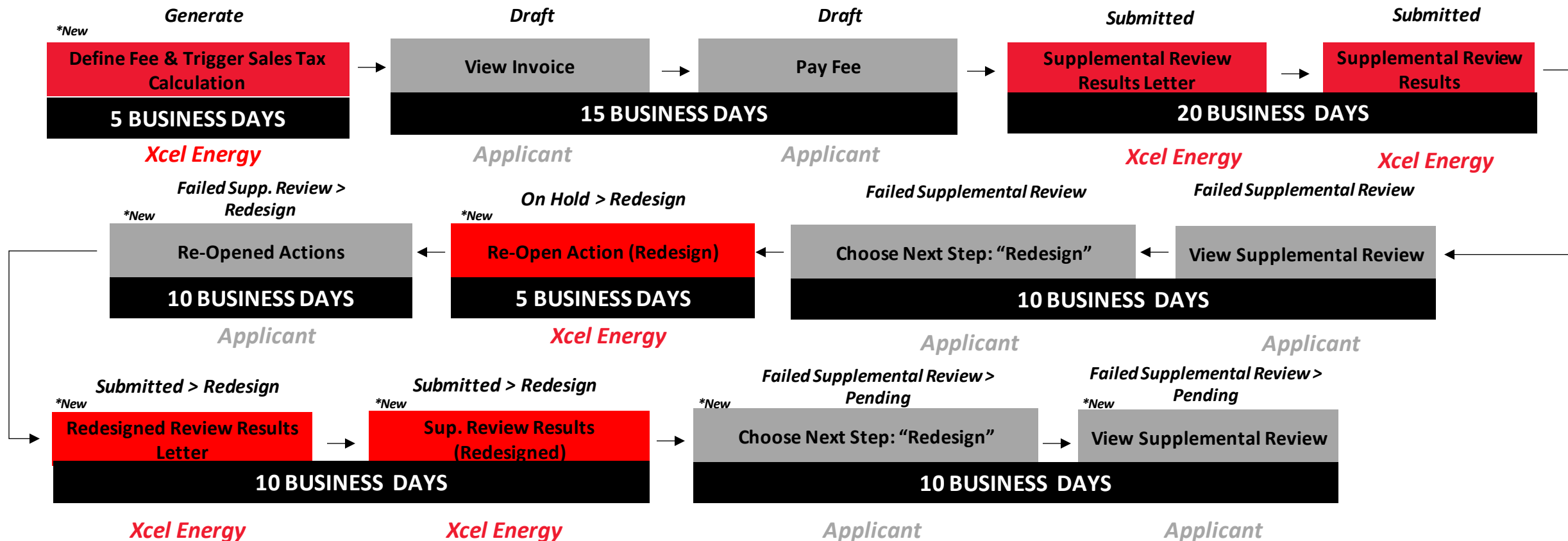


Note: Please refer to the respective DG sections for step-by-step guidance for the Supplemental Review Status.

Status: Supplemental Review

All Program Types – Redesign and Resubmit Application

- In NM, for all programs, the supplemental review is an additional engineering evaluation to determine if a generating facilities can be interconnected following the (simplified or fast track) process without the need for detailed study.
- The Redesign Application option must be offered once after a failed Supplemental Review.



Note: Please refer to the respective Track Type sections for step-by-step guidance for Track Type requirements.

Detailed Study Track Type

All Program Types

- A track type will always be “Simple” or “Fast” Track Type through Engineering Screens and Supplemental Review; **the expectation is that S*RC program applications will always be “Fast” Track.**
- In NM, for all programs, the track type for an application is to be updated to “Detailed Study” when any of the detailed studies – Feasibility Study, System Impact Study, Facilities Study, Transmission System Impact Study - is triggered.

Case #: 05367425
Status: Initiate Application
Step: Draft
Sub-Step:
App Owner: Please enter contact information, system and application details, and other ancillary actions before continuing.

Save & Continue

Actions Finalized Actions Milestones Completed Milestones Application Details

Application Information

Solar Garden

Track
Fast Track

DER Type
Solar PV

Energy Storage System Included

System Capacity kW
60,000

DER will be used for the following

State
New Mexico

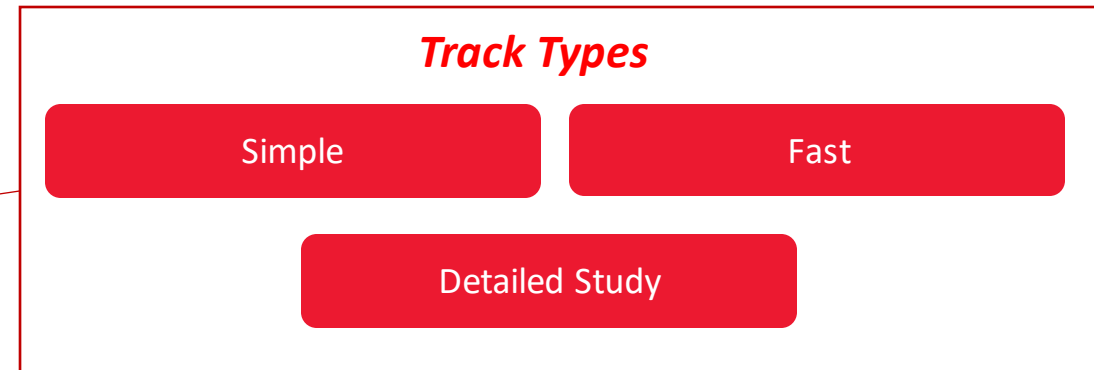
New or Modified DER

DER Generator Type
PV/Inverter

AC Active Power Nameplate Rating (kW)
59,964

System Capacity (kWh)
66,103.719

MN Vintage

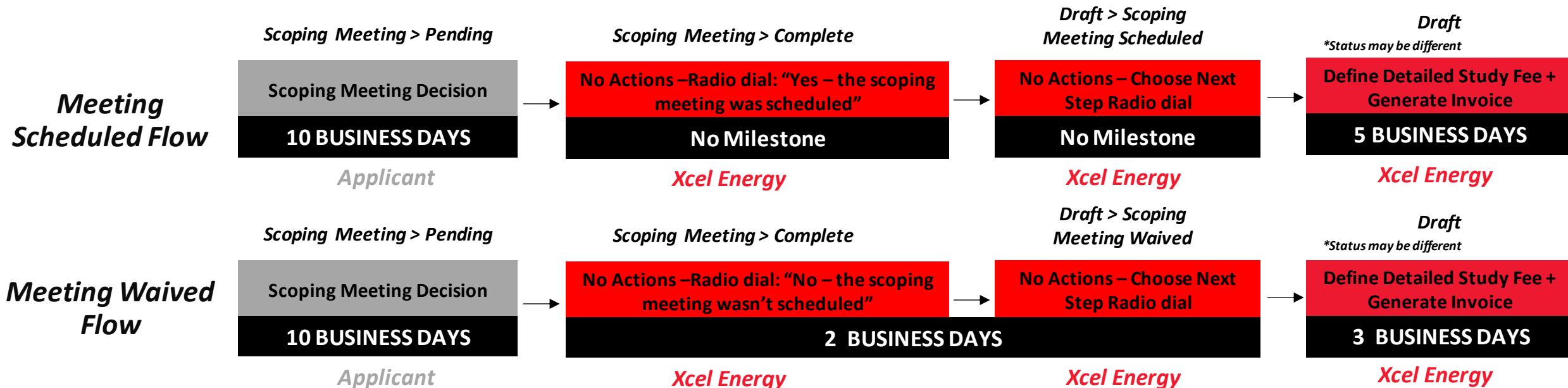


Note: Please refer to the respective DG sections for step-by-step guidance for the Scoping Meeting section.

Detailed Study - Scoping Meeting

All Program Types

- In NM, for all programs, prior to starting any Detailed Study (Supplemental Review, Feasibility Study, Transmission Impact Study, Facilities Study), the Applicant may choose to schedule or waive a scoping meeting.
- The below milestone requirements allows Xcel Energy to ensure that there is not risk to be uncompliant with the 5 days milestone defined in the [NM Interconnection Rule](#) in the case that the application sits for any given period in the Detailed Study > Scoping Meeting > Complete SSS.

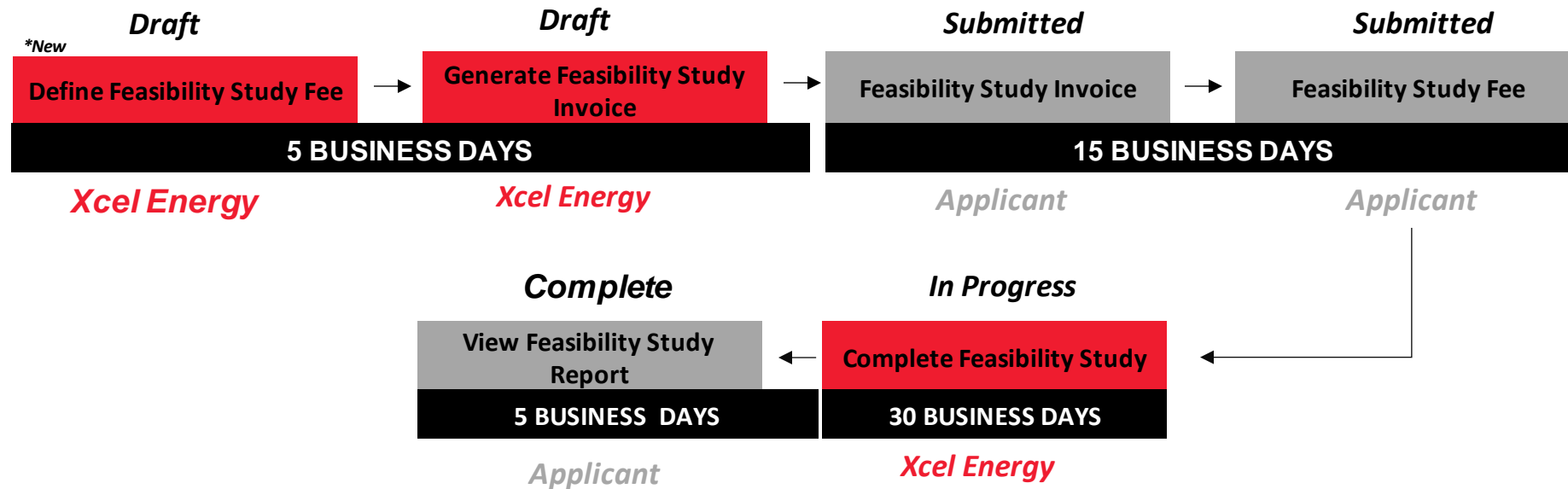


Note: Please refer to the respective **DG sections** for step-by-step guidance for the Feasibility Status.

Status: Feasibility Study

All Program Types

- In NM, for all programs, the Feasibility Study is a review conducted to identify any potential adverse system impacts that would result from interconnection of the generating facility.
- If the application is deemed “Safe and Reliable for Interconnection”, the status will move to Interconnection Application.
- If the application requires further review, the step will move to Engineer selected next step.

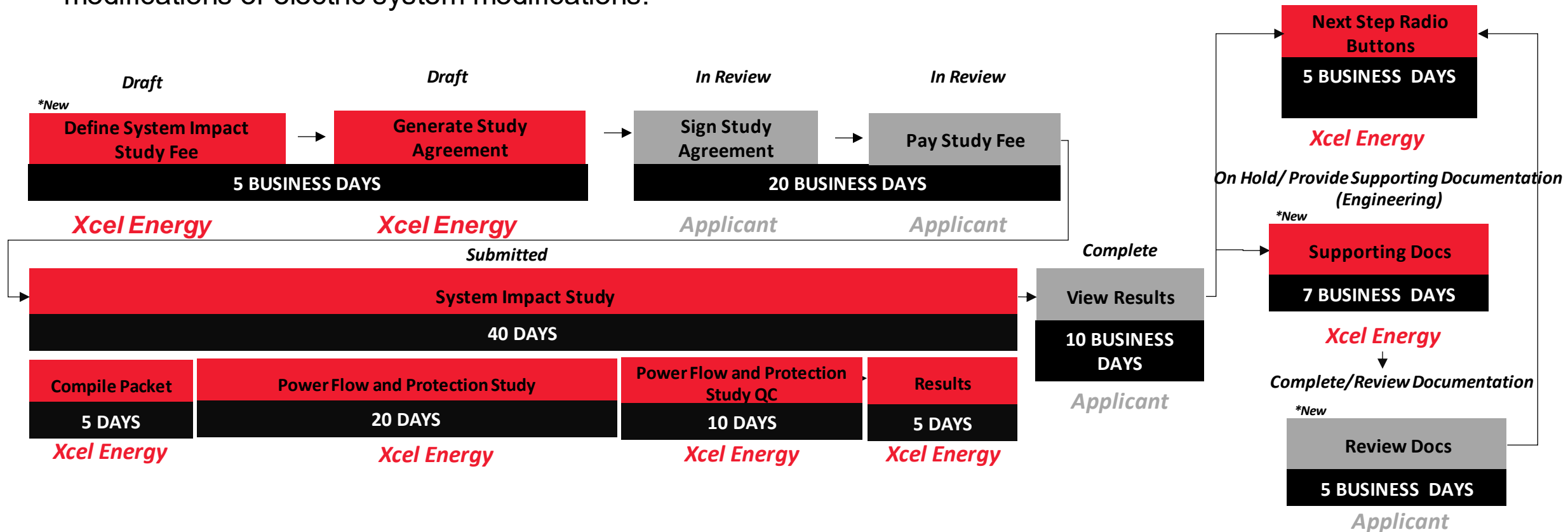


Status: System Impact Study

Note: Please refer to the respective DG sections for step-by-step guidance for the System Impact Study Status.

All Program Types

- In NM, for all programs, the System Impact study is a study that identifies and details the electric system impacts that would result if the proposed generating facility were interconnected without project modifications or electric system modifications.

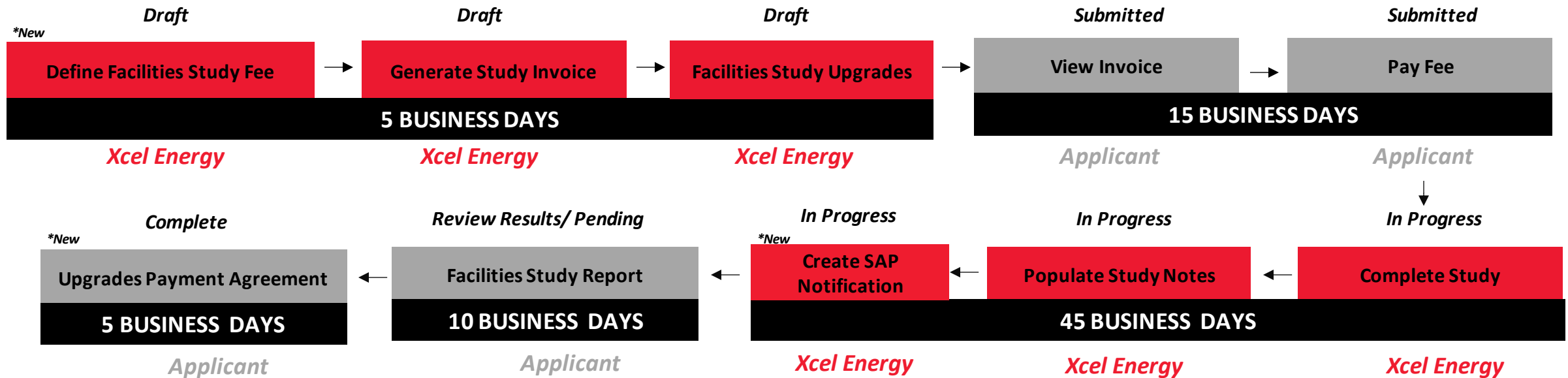


Status: Facilities Study (Upgrades Required)

All Program Types

Note: Please refer to the respective DG sections for step-by-step guidance for the Facilities Study Status.

- In NM, for all programs, a Facilities Study is a study that specifies and estimates the cost of the equipment, engineering, procurement, and construction work needed to implement the conclusions of the system impact study.
- Upon completion of the study within 45 days, if the applicant agrees to pay for the interconnection facilities or upgrades identified within this study, the status will move to Interconnection Agreement status.
- Upon completion of the study, the applicant will have the option to withdraw their application.

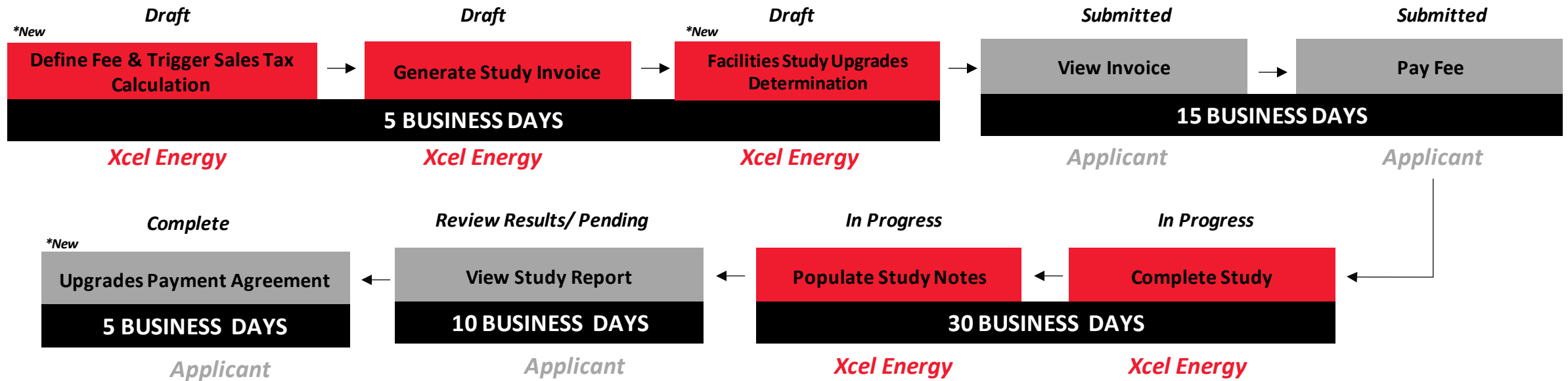


Status: Facilities Study (No Upgrades Needed)

All Program Types

Note: Please refer to the respective DG sections for step-by-step guidance for the Facilities Study Status.

- In NM, for all programs, the Facilities Study is a study that specifies and estimates the cost of the equipment, engineering, procurement, and construction work needed to implement the conclusions of the system impact study.
- Upon completion of the study within 30 days, the status will move to the Interconnection Agreement status.
- Upon completion of the study, the applicant will have the option to withdraw their application.

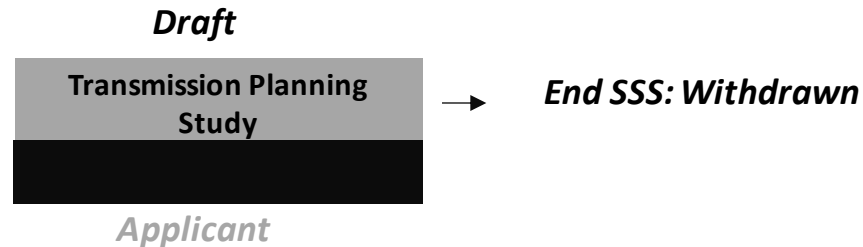


Status: Transmission Impact Study

All Program Types

Note: Please refer to the respective DG sections for step-by-step guidance for the Transmission Impact Study Status.

- In NM, for all programs, the Transmission Impact Study is a study conducted by the transmission provider to determine if the DER causes any adverse transmission impacts.
- If the application reaches this study, the application will automatically be withdrawn after the applicant reviews instructions to be redirected to the Transmission Department within Xcel Energy.



Interconnection Application
05367154

Program Type: Distributed Generation
Product: CO - Distributed Energy Resource only
Address: [Redacted]
City: [Redacted]
County: Adams

Case #: 05367154
Status: Transmission Impact Study
Step: Draft
Sub-Step:
App Owner: Xcel Energy has indicated that your application needs a Transmission Study. View instructions below.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Transmission Planning Study	View instructions for proceeding with Transmission Study.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Please see Milestones tab for deadline.

Create A New Post

* Topic: --None--

* Question: [Text Area]

Include attachment?

Next

Sort by: Most Recent Activity

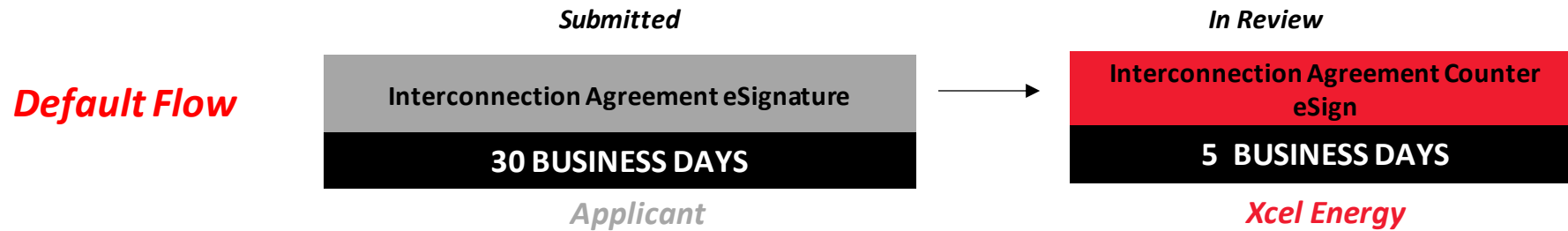
Search this...

Note: Please refer to the respective DG sections for step-by-step guidance for the Interconnection Agreement Status.

Status: * Interconnection Agreement

All Program Types

- In NM, for all programs, this is the status where both the applicant and utility sign the Interconnection Agreement Contract that formally documents terms and conditions related to the operation and maintenance of any DER in accordance with the NM regulation Non-Simplified Interconnection Agreement.
- The Interconnection Agreement may be manually generated by the utility if needed (see slide at the end of the Interconnection Agreement status section).

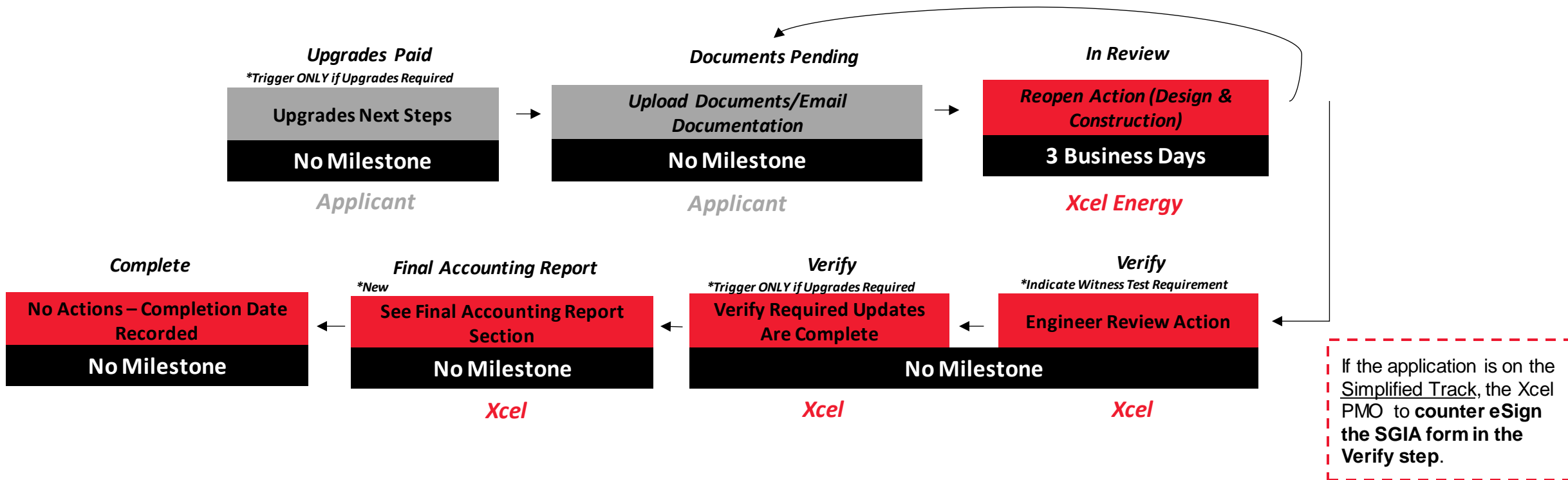


Note: Please refer to the respective DG sections for step-by-step guidance for the Design & Construction Status.

Status: * Design & Construction

All Program Types

- In NM, for applications that require upgrades for all program types, this is the status where the applicant will be prompted to confirm upgrades have been paid.
- During this status, for all program types, the applicant will be prompted to upload documents pending. If there is anything missing/incorrect, you will be asked to resubmit.



Note: Please refer to the respective DG sections for step-by-step guidance for the Design & Construction Status.

Status: * Design & Construction

All Program Types – Step: Documents Pending

- In NM, for all programs, after Xcel has approved the results of the application’s Review (and studies), the applicant will be asked to upload/email the documentation below:

Case #: 05368536
Status: Design and Construction
Step: Documents Pending
Sub-Step:
App Owner: Your application is pending submission of the following documents before testing and finalizing your application.

Submit

After completing all actions, click “Submit”

For each document required, actions will be marked with an asterisk.

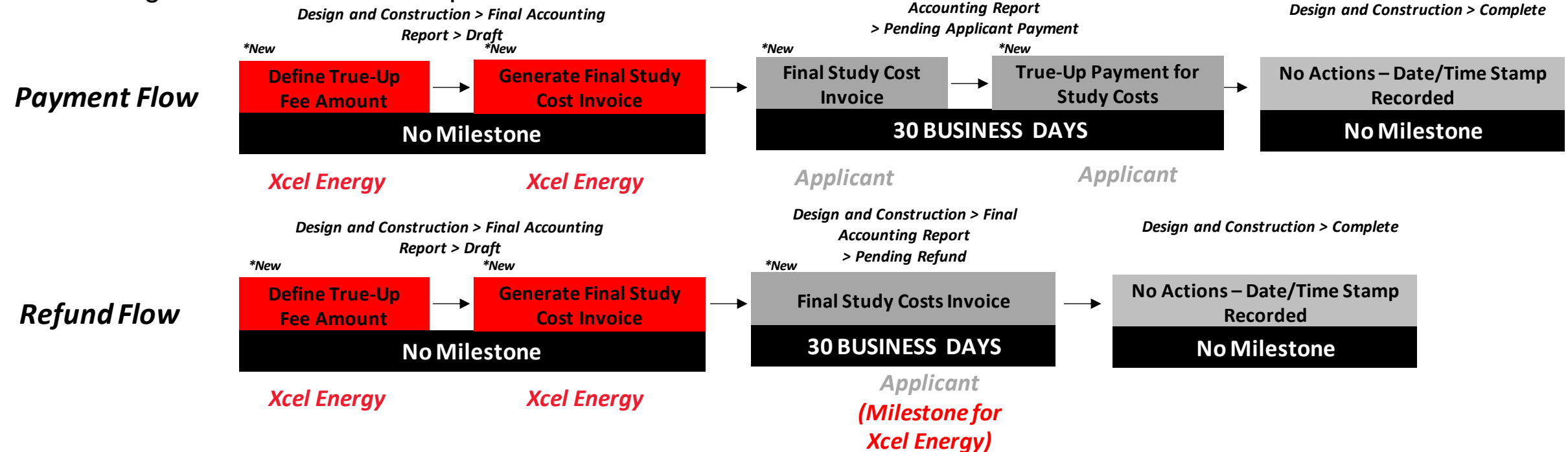
- (Populate) Installation Details
- *(Email) Final Electrical Inspection
- (Upload) *Insurance Policy
- (Email) Equipment Specification
- (Upload) As Built One Line
- (Upload) As Built Site Plan
- (Email) 911 Documentation
- (Download) Witness Test Procedure

Note: Please refer to the respective DG sections for step-by-step guidance for the Design & Construction Status.

Status: * Design & Construction

All Program Types – Step: Final Accounting Report

- In NM, for all programs, for each of the detailed studies conducted, any study fees shall be based on the utility’s actual costs and will be invoiced to the applicant after the study is completed.
- For all programs, the applicant must pay any study costs that exceed the deposit without interest; if the deposit exceeds the invoiced fees, the utility shall refund such excess without interest.
- For all programs, this payment or refund payment will be deposited prior to an interconnection application reaching the Meter Enrollment process.

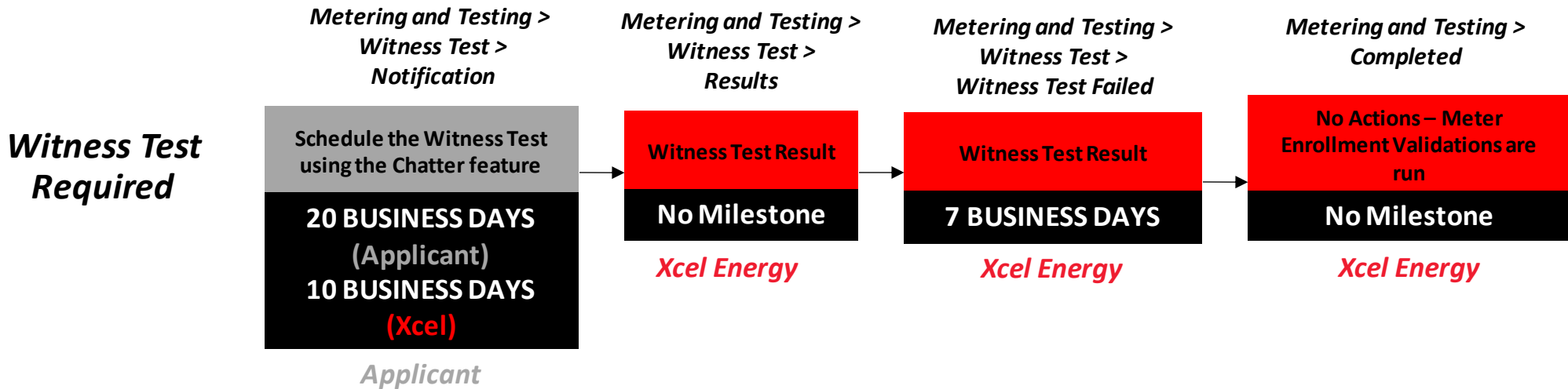


Status: * Metering & Testing

Solar*Rewards Community Program

Note: Please refer to the respective DG sections for step-by-step guidance for the Metering & Testing and Permission to Operate Statuses.

- During the Metering and Testing status, the Xcel Energy Program team will request the required solar meter(s) if the final documents and Solar Agreements meet program requirements. A meter technician will attempt to install the meter within 10 business days of the Solar Team initiating a meter request.
- All Solar*Rewards Community Program applications will require a Witness Test.

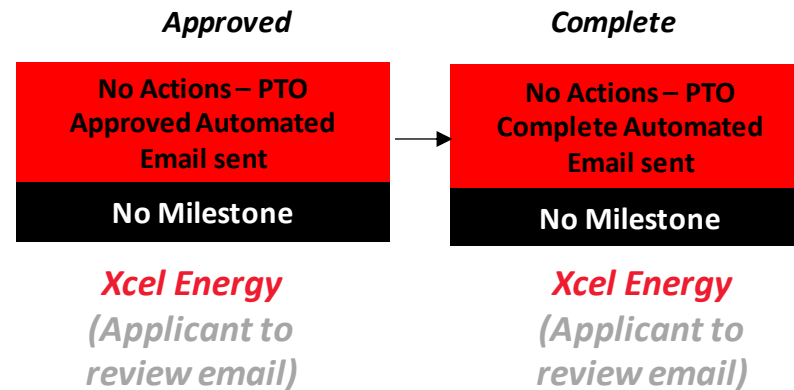


Note: Please refer to the respective DG sections for step-by-step guidance for the Permission to Operate Status.

Status: * Permission to Operate

All Program Types

- In NM, for all programs, once the meter has been enrolled, you will move to the Permission to Operate status.
- For all programs, after you receive an email granting Permission to Operate, your application will be moved to the Complete step during which you will receive an email confirming your application is complete.
- There is no action needed on the portal by Xcel Energy nor the Applicant at this point in the application process, both emails are sent to the applicant.



Status: Material Modification Review

All Program Types

- In NM, for all programs, at any time after an interconnection application is deemed complete or an interconnection agreement has been signed, if the applicant wishes to make modifications to the planned generating facility it shall submit to the utility, in writing, all proposed modifications to any information provided in the interconnection application or in the interconnection agreement.

Status: Material Modification Review
Step: Draft
Sub-Step:
App Owner: Your proposed modifications to your application is pending submission. You can save your draft application at anytime and return to complete it later.

[Submit](#)

[Submit Proposed Modifications](#)

Your request has been submitted.

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Material Modification Documents	Please detail all proposed modifications to any information previously provided to the interconnection application.	Open	Applicant	<input type="checkbox"/>	Action



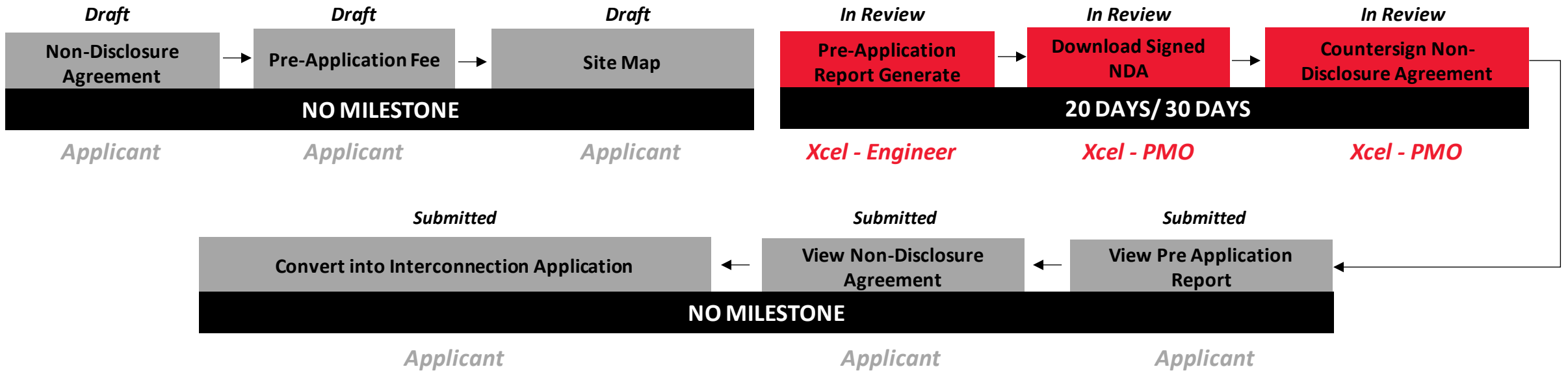
**Appendix:
Pre-Application Data Request (PADR)**

PADR

Process Flow

What is a PADR?

- This is a Pre-Application data request. When an applicant is not ready to start an application and would like to undergo a pre-application engineer review, they can submit a data request.
- Xcel Energy will share a Pre-Application report with the applicant, and they can choose whether to proceed with an application.



PADR


Getting Started

After logging in, select “New Mexico” as the State, and “Pre-Application Data Request” as the Application Type. Then, click “Next.”


Start a new Interconnection Application

*Required


*Select State




Minnesota



Colorado



Wisconsin



New Mexico

Select a State to continue

*Required

*Select Application Type

Pre-Application Data Request

Application

Pre-Application Data Request

PADR

PADR Request Form

Review the Details and Requirements for the Pre-Application Data Request and click "Next".

Pre-Application Report Request Form

Requests for an Interconnection Pre-Application Report shall include information to clearly and sufficiently identify the location of the proposed Point of Common Coupling and relevant project details.

Additionally, a non-refundable processing fee is required. Fee amount is \$300 per site if 1 MW AC or less, \$500 per site if over 1 MW AC.

Upon receipt of a complete Request Form (including site map) and processing fee, Xcel Energy shall provide a report within 20 business days for 1 MW, 30 business days for larger systems. A Pre-Application Report request does not obligate Xcel Energy to conduct a study or other analysis of the proposed project if data is not available.

Disclaimer: Pre-Application Data Reports will only include pre-existing data and do not obligate Xcel Energy to conduct a study or other analysis of the proposed project in the event that data is not available. For all Pre-Application Data Reports, if Xcel Energy cannot complete all or some of a Pre-Application Data Report due to lack of available data, Xcel Energy will provide the applicant with a Pre-Application Data Report that includes the information that is available. In requesting a Pre-Application Data Report, the applicant understands that 1) the existence of "Available Capacity" in no way implies that an interconnection up to this level may be completed without impacts since there are many variables studied as part of the interconnection review process, 2) the distribution system is dynamic and subject to change and 3) data provided in the Pre-Application Data Report may become outdated and not useful at the time of submission of the complete Interconnection Request. Xcel Energy will, in good faith, provide Pre-Application Data Report data that represents the best available information at the time of reporting.

Click "NEXT" to start the Pre-Application Report Request Form.

Back

Next

PADR

Contact Information

Populate all fields in order to complete the Contact Information Page and proceed with your application. Once all fields are populated, click "Next".

*Required

Requestor Contact Information

* Name

Complete this field.

Company Name (if applicable)

* Street Address

* City

* State
--None--

* Zip Code

* Phone Number

* Email Address

PADR

Project Information

* Project Type

- None--
- None--**
- Community Solar Projects (CSP)
- Qualifying Facility (QF)
- Customer Sited

* DER Type

- None--
- None--**
- Solar PV
- Diesel
- Wind
- Hydro
- Natural Gas
- Biomass
- Bio-gas
- Geothermal
- Battery

* Service Voltage ⓘ

- None--
- None--**
- 120 1ph
- 120/240 1ph
- 120/208 1ph
- 120/208 3ph
- 277/480 3ph
- 120/240 delta 3ph
- 240/480 delta 3ph
- Other v/ph

Project Information

*Required

* Project Name

Complete this field.

* Project Type

--None--

* DER Nameplate Rating (kW)

* DER Type

--None--

* DER Number of Phases ⓘ

Single Phase Three Phase

* Service Voltage ⓘ

--None--

* Stand-alone Generator (no onsite load)?

Yes No

* Existing DER? ⓘ

New DER(s) Material Modification

Back Next

Provide details on the project and populate the Project Information page. Once complete, click "Next".

PADR

Point of Common Coupling

Provide details on the proposed point of common coupling. The proposed Point of Common Coupling shall be defined by all or some combination of the entered information. Not all fields are required. Once complete, click "Submit".

Proposed Point of Common Coupling

*Required

Note: The proposed Point of Common Coupling shall be defined by all or some combination of the below information, enough to clearly identify the location of the Point of Common Coupling.

Street Address

* Site GPS Coordinates ⓘ

City

State

Zip Code

County

Cross Streets

* PCC GPS Coordinates ⓘ

Meter Number

Utility Equipment Number (e.g. pole number)

Other Identifying Information

PADR

Request Created

Your request has now been created. Note your application number and click "Complete Pre-Application" to continue with your Pre-Application.

Congratulations, you successfully started your interconnection Pre-Application Report request.

Your application number is **04468890**

To complete the Pre-Application Report request, click "Complete Pre-Application" and follow the provided steps.

[Complete Pre-Application](#)

Pre-Application

Step: Draft

Complete (3) Actions, by clicking on the “Action” Button.

- The Action will open in a new window.
- Once complete, close the tab and return to this screen.
- Refresh and the Status will have switched from “Open” to “Draft”.

Case #: 04468890
 Status: Pre-Application
 Step: Draft
 Sub-Step:
 App Owner: Complete the NDA Form, pay the Pre-Application fee and upload site map.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Non-Disclosure Agreement	Please provide a signed non-disclosure agreement associated with your application.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Pre-Application Fee	Please pay the Application Fee through online payment to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action
Site Map	Please provide a site map that includes true north, proposed project location (including general area of project), proposed service point location, and major roads, streets and/or highways	Open	Applicant	<input checked="" type="checkbox"/>	Action

Note: From this point until the application is converted to an Interconnection Application, the application is in the Pre-Application status.

Pre-Application

Action: Non-Disclosure Agreement

CONFIDENTIALITY AGREEMENT

THIS CONFIDENTIALITY AGREEMENT ("Agreement"), entered into and made effective as of the ____ day of _____ 20__ (the "Effective Date"), is by and between _____ [legal name of counterparty] ("Requesting Party"), a _____ [state of formation] _____ [type of legal entity], and Southwestern Public Service Company, a New Mexico corporation ("Disclosing Party"), both parties referred to individually as the "Party" and collectively as the "Parties."

WITNESSETH:

WHEREAS, *Disclosing Party* intends to disclose information to *Requesting Party* in response to *Requesting Party's* request(s) for distribution infrastructure and load analysis on a per-feeder basis. All such material or information disclosed in response to *Requesting Party's* request(s) consists of information designated and deemed to be non-public security and infrastructure data that is confidential to *Disclosing Party* ("Confidential Information"); and

WHEREAS, the *Requesting Party* intends to use the Confidential Information to determine whether to pursue, or to continue pursuing, an interconnection application and interconnection agreement with *Disclosing Party* ("*Project*").

WHEREAS, the Parties have entered into this Agreement in order to ensure the confidentiality of all such information and the confidentiality of the discussions between the Parties to prevent the disclosure of same to third parties except as permitted herein;

NOW, THEREFORE, in consideration of the mutual promises and covenants made herein, and with the intent to be legally bound hereby, the Parties agree as follows:

1. **Confidential Information.** The term "Confidential Information" as used in this Agreement shall mean non-public security and infrastructure data, any and all written, printed or other materials provided by *Disclosing Party* to the *Receiving Party* concerning the Project. Confidential Information shall include Critical Energy Infrastructure Information ("CEII") as defined by the Federal Energy Regulatory Commission ("FERC"). Notwithstanding the foregoing, no information disclosed shall be considered to be Confidential Information unless it is clearly marked "Confidential." No information disclosed verbally shall be considered to be Confidential Information unless such information is (a) verbally described as such by the *Disclosing Party* on the date of disclosure, and (b) identified as such by the *Disclosing Party* sending the *Receiving Party* the _____ within five business days after _____ determine, in its sole judgment, what _____ Information shall not include the _____

Download the document, write the date, sign the bottom portion of the document.

IN WITNESS WHEREOF, the Parties hereto have entered into this Agreement as of the Effective Date.

[Counterparty legal name]

Southwestern Public Service Company, a New Mexico corporation

By: _____

By: _____

Printed Name: _____

Printed Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

Download [Non-Disclosure Agreement Form.](#)

Upload Non-Disclosure Agreement

Upload Files Or drop files

Applicant to upload signed document.

After uploading the signed document, click "Submit."

Submit

Pre-Application

Action: Site Map

Site Map	Please provide a site map that includes true north, proposed project location (including general area of project), GPS Coordinates, proposed service point location, and major roads, streets and/or highways.	Open	Applicant	<input checked="" type="checkbox"/>	Action
----------	--	------	-----------	-------------------------------------	--------

Upload Site Map

Or drop files

Submit

Upload Site Map and click "Submit".

Pre-Application

Action: Pre-Application Fee

Pre-Application Fee	Please pay the Pre Application Fee through online payment to advance your application to the next step.	Open	Applicant	<input checked="" type="checkbox"/>	Action
---------------------	---	------	-----------	-------------------------------------	--------

Please see directions below for online payment. If preferred, fee(s) can always be paid traditionally via check/wire and form.

- Fee invoice(s) are available now on the Wells Fargo payment site.
- The invoice(s) are ready for online payment.
- Payments will post to the applicable application ID the day after payment is made to Wells Fargo (another 24 hours).
- Please enter Primary Authorization Code **SR-10937239** and Secondary Authorization Code **321111** to complete online payment with Wells Fargo.
- Primary and Secondary codes are unique to your account. Once an account is set-up, you can use the same codes for each application as needed.
- Credit card payment will not be accepted.

Take note of the computer generated "Primary Authorization Code" and "Secondary Authorization Code".

Payment Details:

Item Description	Invoice Number	Amount Due	Due Date	Payment Status
Pre-Application Fee	05368515-PN-0035495	\$300.00	Nov 1, 2023	Not Paid

Please click the 'Pay Fee Online' button for online payment.

Pay Fee Online

Click "Pay Fee Online". You will be redirected to Wells Fargo to submit payment.

Pre-Application

Action: Pre-Application Fee

Wells Fargo payment steps (one-time payment):

- Open "make payment" tab
- Use Primary and Secondary authorization codes
- Authorization codes located within Fee Action

Wells Fargo payment steps (registered):

- Use your login credentials to login into your account
- Your Wells Fargo credentials will differ from your DER portal credentials
- Your invoice will appear in the top right corner

The screenshot shows the Wells Fargo login interface. At the top, there are two tabs: "LOGIN" and "MAKE PAYMENT". Below the tabs, there are two buttons: "Registered Users" and "One-Time Payments". The "Registered Users" button is highlighted with a red box and a red arrow pointing to the "LOGIN" tab. The "One-Time Payments" button is highlighted with a red box and a red arrow pointing to the "MAKE PAYMENT" tab. Below the buttons, there are two input fields: "Login ID" and "Password". Below the "Login ID" field, there are two links: "Forgot your Login ID?" and "Password Help?". At the bottom right, there is a green "Login" button.

Pre-Application

Step: Draft

- Once all (4) actions are complete, and are in the “Draft” status, click “Submit” to the “In Review” step.
- If you have completed an action, but the status is “Open”, refresh the page.

Case #: 04468890

Status: Pre-Application

Step: Draft

Sub-Step:

App Owner: Complete the NDA Form, pay the Pre-Application fee and upload site map.

Submit

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Non-Disclosure Agreement	Please provide a signed non-disclosure agreement associated with your application.	Draft	Applicant	<input checked="" type="checkbox"/>	Action
Pre-Application Fee	Please pay the Application Fee through online payment to advance your application to the next step.	Draft	Applicant	<input checked="" type="checkbox"/>	Action
Site Map	Please provide a site map that includes true north, proposed project location (including general area of project), proposed service point location, and major roads, streets and/or highways	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Pre-Application

Step: Submitted

- Once the Xcel Engineer has submitted the Report and countersigned the Non-Disclosure Agreement, your application will proceed to the “Submitted” step.
- View the report, view the counter-signed NDA form and/or convert the PADR into an Interconnection Application.
- Click on “Action” to view the Non-Disclosure Agreement and to view the Pre-Application Report, then convert the Pre-Application Request into an Interconnection Application.

Case #: 05368553
 Status: Pre-Application
 Step: Submitted
 Sub-Step:
 App Owner: Your Pre-Application Report is ready for review. To proceed with an interconnection application, follow the provided steps.

[Submit](#)

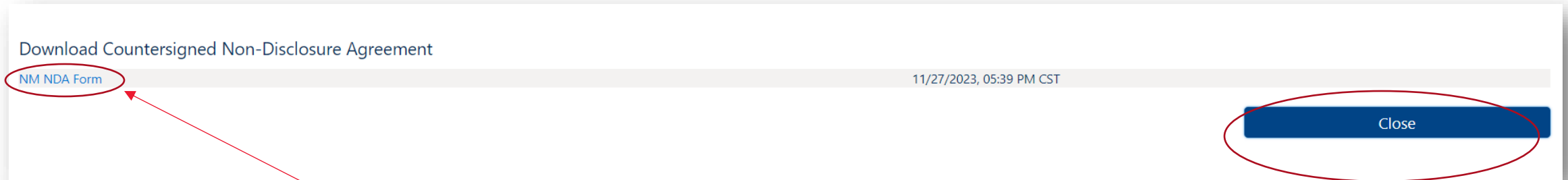
[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Convert into Interconnection Application	Provide Interconnection application details.	Open	Applicant	<input checked="" type="checkbox"/>	Action
View Non-Disclosure Agreement	View the Countersigned Non-Disclosure Agreement	Open	Applicant	<input type="checkbox"/>	Action
View Pre-Application Report	Your Pre-Application Report is available for download.	Open	Applicant	<input type="checkbox"/>	Action

Pre-Application

Action: View Non-Disclosure Agreement

- After Xcel has counter-signed the Non-Disclosure Agreement, the applicant can download it and view it.
- To access the document, click on the document name and download the document.



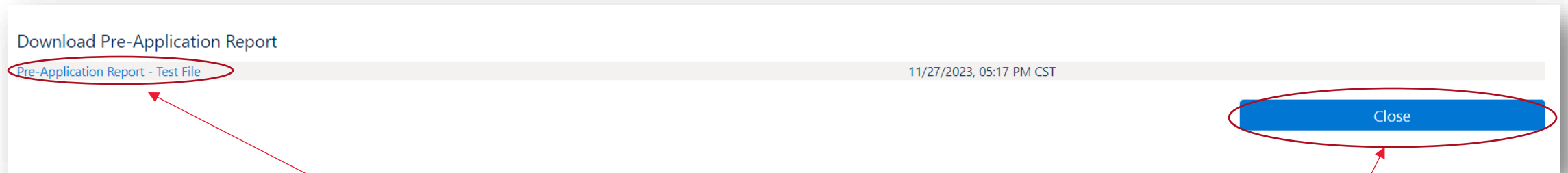
1
Download the Non-Disclosure Agreement counter-signed by Xcel Energy.

2
Click "Close" once you have viewed the Non-Disclosure Agreement counter-signed by Xcel Energy.

Pre-Application

Action: View Pre-Application Report

- After Xcel Energy has completed the Pre-Application review, the applicant has the option to download and view the Pre-Application Report.
- To access the document, click on the document name and download the document.



1
Download the Pre-Application Report uploaded by Xcel Energy.

2
Click "Close" once you have viewed the report.

Pre-Application

Step: Submitted

- Once the applicant has viewed the report and viewed the counter-signed NDA form (these 2 actions are optional), the applicant will have to convert the PADR into an Interconnection Application to move the application forward.
- Click on “Action” to convert into an Interconnection Application.

Case #: 05368553
 Status: Pre-Application
 Step: Submitted
 Sub-Step:
 App Owner: Your Pre-Application Report is ready for review. To proceed with an interconnection application, follow the provided steps.

Submit

Actions
Finalized Actions
Milestones
Completed Milestones

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Convert into Interconnection Application	Provide Interconnection application details.	Open	Applicant	<input checked="" type="checkbox"/>	Action
View Non-Disclosure Agreement	View the Countersigned Non-Disclosure Agreement	Draft	Applicant	<input type="checkbox"/>	Action
View Pre-Application Report	Your Pre-Application Report is available for download.	Draft	Applicant	<input type="checkbox"/>	Action

Pre-Application

Action: Convert to Interconnection Application; Screen 1

- Click on the “Convert to Interconnection Application” Action.
- Select Program Type and Click “Next”.

*Select Program Type

Solar*Rewards

Solar*Rewards Community

Distributed Generation

Empower Resiliency

Back

Next

Pre-Application

Action: Convert to Interconnection Application; Screen 2

Populate required fields, including Product Type, Address, City, County, Zip Code. Once complete, click "Save".

* Product Type
--None--

* Address

* City

* County
--None--

* Zip Code

Disclaimer Message:

For your convenience, the "Save" button allows your application to be auto-populated, in part, based on information that you previously supplied for a pre-application report for the same location. Please note that each pre-application report has a limited lifespan. Each report is based on vintage of data gathered at the time that the report is assembled. Accordingly, a pre-application may be out-of-date once real-world conditions change from the vintage of the data used in the report. These could include changes in the size or type of other DERs in the queue or in operation, as well as changes to network conditions. Also, a pre-application report is not a substitute for a more robust full engineering study. If you choose to press this button to auto-populate information into your application, please verify that all of the auto-populated information is correct for the application that you are submitting here.

Back

Save

Pre-Application

Action: Convert to Interconnection Application

Thank you for your submission. Your Interconnection Application details have been saved.

Please click the "Finalize" button on the widget to proceed with your Interconnection application.

Your Pre-Application Data Request has now been converted to an Interconnection Application. Click "Submit" to proceed to the Initiate Application status.

Case #: 04468890

Status: Pre-Application

Step: Submitted

Sub-Step:

App Owner: Your Pre-Application Report is ready for review. To proceed with an interconnection application, follow the provided steps.

Submit

Actions Finalized Actions Milestones Completed Milestones

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Convert into Interconnection Application	Provide Interconnection application details.	Draft	Applicant	<input checked="" type="checkbox"/>	Action

Note: Review the **Initiate Application status** section for more details on how to proceed with your Interconnection Application.

Appendix: Modifications

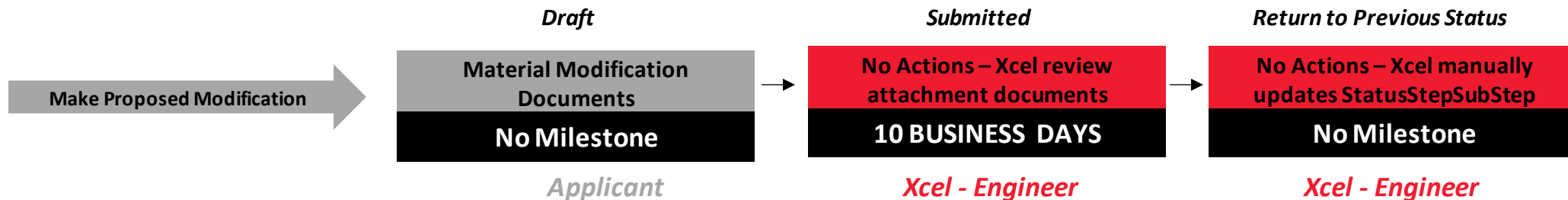
Modifications

All Program Types

- At any time after an interconnection application is deemed complete or an interconnection agreement has been signed, if the applicant wishes to make modifications to the planned generating facility it shall submit to the utility, in writing, all proposed modifications to any information provided in the interconnection application or in the interconnection agreement.

The screenshot shows a user interface for an interconnection application. At the top, it says "Interconnection Application 05368540". Below this, there are three buttons: "+ Follow", "Submit Proposed Modifications" (circled in red), and "Withdraw". A pop-up window above the "Submit Proposed Modifications" button displays the message "Submit Proposed Modifications" and "Your request has been submitted." Below the buttons, there is a table with the following information:

Program Type	Product	Track	Address
Distributed Generation	NM - 2023 Battery Storage Third Party	Fast Track	1601 Commerce Dr



Modifications

Make Proposed Modification

For more information about System Modifications, see page 8 of the [NM Interconnection Rules](#).

TITLE 17 PUBLIC UTILITIES AND UTILITY SERVICES
CHAPTER 9 ELECTRIC SERVICES
PART 568 INTERCONNECTION OF GENERATING FACILITIES WITH A NAMEPLATE RATING UP TO AND INCLUDING 10 MW CONNECTING TO A UTILITY SYSTEM

E. Modifications to generating facility:

17.9.568 NMAC

8

(1) At any time after an interconnection application is deemed complete or an interconnection agreement has been signed, if the applicant wishes to make modifications to the planned generating facility it shall submit to the utility, in writing, all proposed modifications to any information provided in the interconnection application or in the interconnection agreement. Any modification to machine data, equipment configuration, or to the interconnection site of the generating facility not agreed to in writing by the utility and the interconnection customer may be deemed a withdrawal of the interconnection application.

(2) Within 10 business days of receipt of a proposed modification, the utility shall notify the applicant whether a proposed modification to either an interconnection application or an existing generating facility constitutes a material modification.

(a) If the utility determines the proposed modification is a material modification, then the utility shall notify the interconnection customer in writing that the customer may:

(i) withdraw the proposed modification; or

(ii) proceed with a new interconnection application for such modification.

The interconnection customer shall provide its determination in writing to the utility within 10 business days after being provided the material modification determination results. If the interconnection customer does not provide its determination, the proposed modification shall be deemed withdrawn.

(b) If the proposed modification is determined not to be a material modification, then the utility shall notify the interconnection customer in writing that the modification has been accepted and that the customer shall retain its eligibility for interconnection, including its place in the interconnection queue. Existing generating facilities may make the modification without requiring a new interconnection application.

(3) Any dispute as to the utility's determination that a modification constitutes a material modification shall proceed in accordance with the dispute resolution provisions in 17.9.568.26 NMAC.

(4) Any modification to machine data, equipment configuration, or to the interconnection site of the generating facility not agreed to in writing by the utility and the interconnection customer may be deemed a withdrawal of the interconnection application and may require submission of a new interconnection application, unless proper notifications of each party by the other as described in Paragraphs (1) and (2) of Subsection E of 17.9.568.13 NMAC.

Modifications

Make Proposed Modification

- To submit a proposed modification, click the button to the top right of your screen.
- Note: you will not be able to submit modification requests before an interconnection application is deemed complete. If you click the “Submit Proposed Modifications” button an interconnection application is deemed complete, you will receive an error.

Program Type	Product	Track	Address
Distributed Generation	NM - 2023 Battery Storage Third Party	Fast Track	1601 Commerce Dr

If “Submit Proposed Modifications” button is clicked during the Pre-Application status or the Initiate Application status, you will receive the below error.

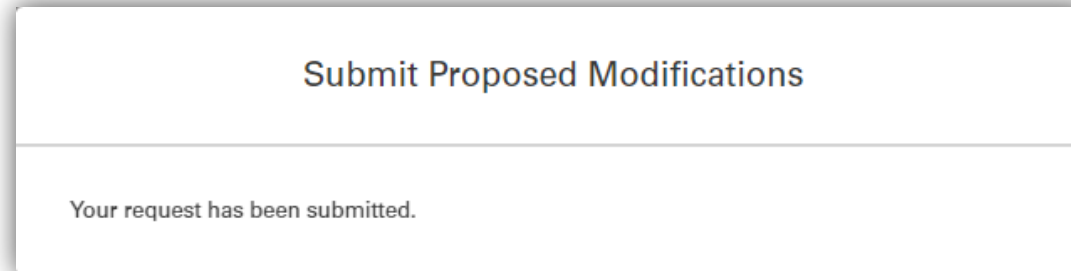
Submit Proposed Modifications

Material Modification Review is not necessary until a Completeness Review has been completed. Please use 'Post a Question' if you have any questions.

Modifications

Make Proposed Modification

- If you click the “Submit Proposed Modifications” button at any point after your interconnection application is deemed complete (during the Initiate Application status), you will receive this message to let you know that your request has been submitted.



- After refreshing the page, you will be **moved to the Material Modification Review status.**

Status: Material Modification Review

Step: Draft

Sub-Step:

App Owner: Your proposed modifications to your application is pending submission. You can save your draft application at anytime and return to complete it later.

Submit

Material Modification Review

Step: Draft

- Submit all documents that detail the proposed modifications to the system and to any information provided in the interconnection application or in the interconnection agreement.

Case #: 05368540
Status: Material Modification Review
Step: Draft
Sub-Step:
App Owner: Your proposed modifications to your application is pending submission. You can save your draft application at anytime and return to complete it later.

[Submit](#)

[Actions](#) [Finalized Actions](#) [Milestones](#) [Completed Milestones](#) [Application Details](#)

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Material Modification Documents	Please detail all proposed modifications to any information previously provided to the interconnection application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

Material Modification Review

Action: Material Modification Documents

- Submit all documents that detail the proposed modifications to the system and to any information provided in the interconnection application or in the interconnection agreement.

ACTION NAME	DESCRIPTION	STATUS	RESPONSIBLE PARTY	REQUIRED?	ACTION
Material Modification Documents	Please detail all proposed modifications to any information previously provided to the interconnection application.	Open	Applicant	<input checked="" type="checkbox"/>	Action

For any changes to a DER application after it has been deemed complete, they have to be submitted as a 'Proposed Change' with updated documents (Site Plan, Single Line Diagram). Once we receive those, the application will route to the appropriate internal team for review. If the review is deemed to be a material modification, then it is not approved and the application must either move forward as is, or be withdrawn and a new application can be submitted with the updated information. If the changes however are not deemed to be material modifications, then the changes are approved and you can upload the new documentation to the portal to be used for the Engineering Screens and Studies when the project is taken off hold.

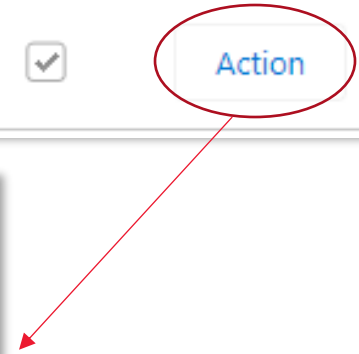
Please download and fill in the template.

[Material Modification Summary](#)

Upload Material Modification Documents

 Upload Files Or drop files

Submit



Material Modification Review

Action: Material Modification Documents

- Submit all documents that detail the proposed modifications to the system and to any information provided in the interconnection application or in the interconnection agreement.

For any changes to a DER application after it has been deemed complete, they have to be submitted as a 'Proposed Change' with updated documents (Site Plan, Single Line Diagram). Once we receive those, the application will route to the appropriate internal team for review. If the review is deemed to be a material modification, then it is not approved and the application must either move forward as is, or be withdrawn and a new application can be submitted with the updated information. If the changes however are not deemed to be material modifications, then the changes are approved and you can upload the new documentation to the portal to be used for the Engineering Screens and Studies when the project is taken off hold.

Please download and fill in the template.
Material Modification Summary

Upload Material Modification Documents

[Upload Files](#) Or drop files

[Submit](#)

Click 'Material Modification Summary' to download invoice template.

Application
Colorado | Minnesota | New Mexico | Wisconsin

[Clear form](#)

Material Modification Summary

Project/customer name _____
Project address _____ City _____ State _____ ZIP _____
Case number _____
Submitted by _____

Please provide as much detail as possible.

Changes to Site Plan:

Item	Old Site Plan	New Site Plan

Changes to One Line:

Item	Old Site Plan	New Site Plan

Other Miscellaneous Changes:

Item	Old Site Plan	New Site Plan

xcelenergy.com | © 2023 Xcel Energy Inc. | Xcel Energy is a registered trademark of Xcel Energy Inc. | 23-03-534

