



Stakeholder Training

SPP INTERCONNECTION MANAGEMENT SYSTEM

GI APPLICATION SUBMISSION TOOL

USER GUIDE

*Working together to responsibly and economically
keep the lights on today and in the future.*



sppstakeholdertraining@spp.org

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USER REGISTRATION/ SIGN IN

USER REGISTRATION / SIGN IN

<https://sims.spp.org/login>

1. **Existing users** sign in using username or email and password.

2. **New users** navigating to the portal's publicly accessible webpage register a user account by clicking Sign Up.

Interconnection Portal

Sign in to your account

Username or email

Password

Remember my username on this device

Sign In

[Need help signing in?](#)

Don't have an account yet? [Sign Up](#)

USER REGISTRATION / SIGN IN | SIGN UP

To register as a new user, click **"Sign Up"** button, then follow User Registration flow by entering:

1. Username
2. Email address
3. Password
4. Clicking Captcha
5. Click "Register"

Interconnection Portal

Sign in to your account

Username or email

Password

Remember my username on this device

Sign In

[Need help signing in?](#)

Don't have an account yet? [Sign Up](#)

GridUnity Interconnection Portal

User Registration

- ▶ User Registration
 - Account Information
 - Captcha
- Email Confirmation
- Completion

Account Information

1 Enter your username

2 Enter your email address

3 Enter password

Password Requirements

- Must be at least 8 characters long
- Must not exceed 15 characters
- Must contain at least 1 uppercase character
- Must contain at least 1 lowercase character
- Must contain at least 1 numeric character
- Must contain at least 1 special character

Captcha

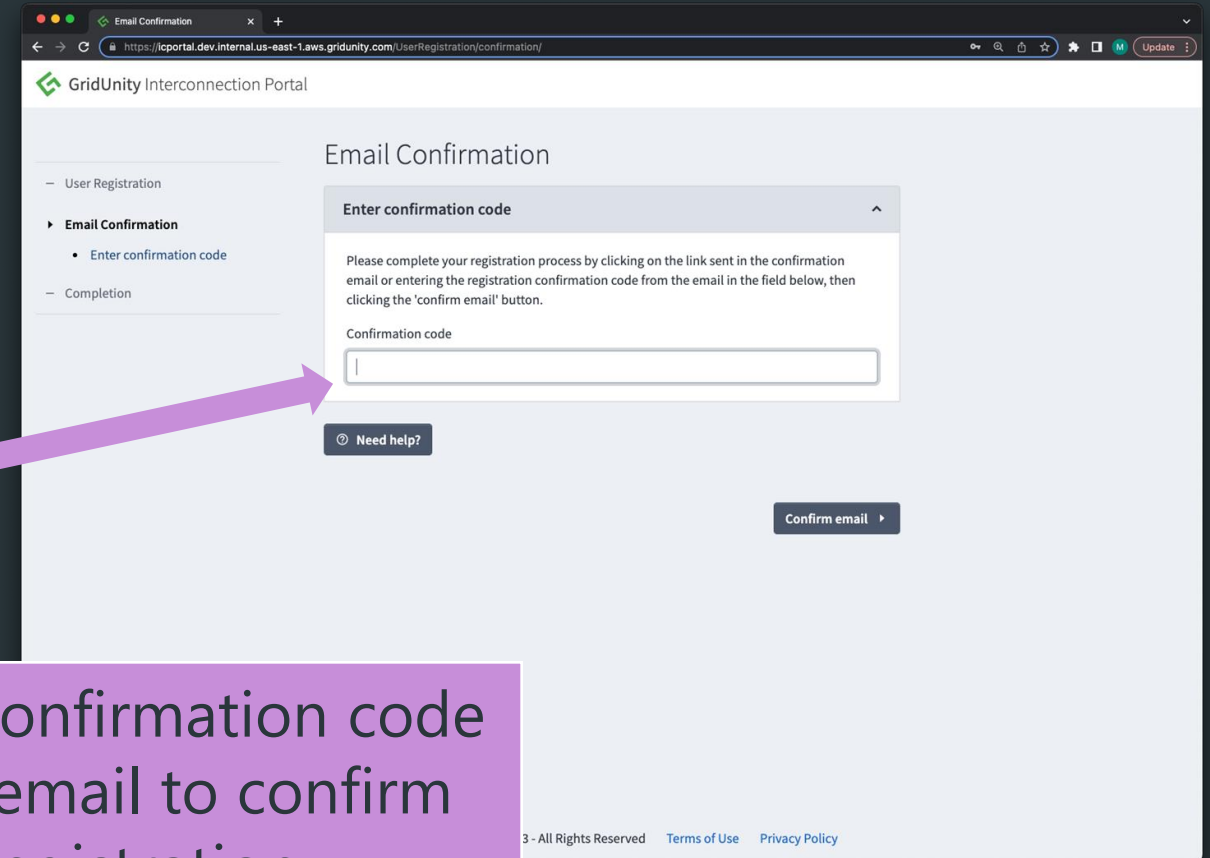
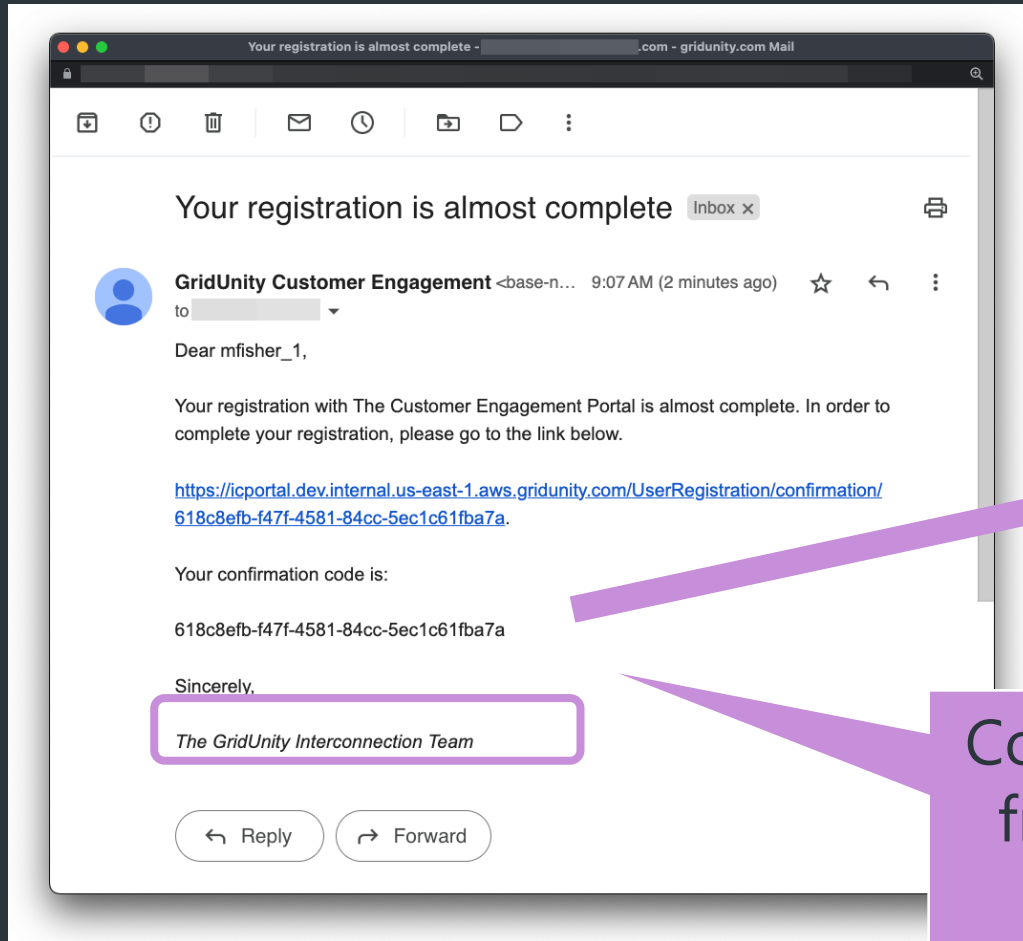
4 I'm not a robot

5 Register

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Note: User registration process may vary for systems with integrated Single Sign On (SSO) support.

USER REGISTRATION / SIGN IN | SIGN UP



Copy confirmation code from email to confirm registration.

USER REGISTRATION / SIGN IN | FORGOT PASSWORD

For sign in support:

1. Click "Need help signing in?", then
2. follow Forgot Password flow.

Interconnection Portal

Sign in to your account

Username or email

Password

Remember my username on this device

Sign In

1 Need help signing in?

Don't have an account yet? Sign Up

GridUnity Interconnection Portal

Forgot Password

Enter username to reset password

2 Username

I'm not a robot

Send reset password email

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HOME SCREEN

HOME SCREEN

1. Global Navigation Menu

Present on all pages. Provides user ability to navigate throughout system.

2. Outstanding Actions

User-configurable summary of projects requiring important actions. Includes links to filtered list of relevant projects for easy access.

3. What's New

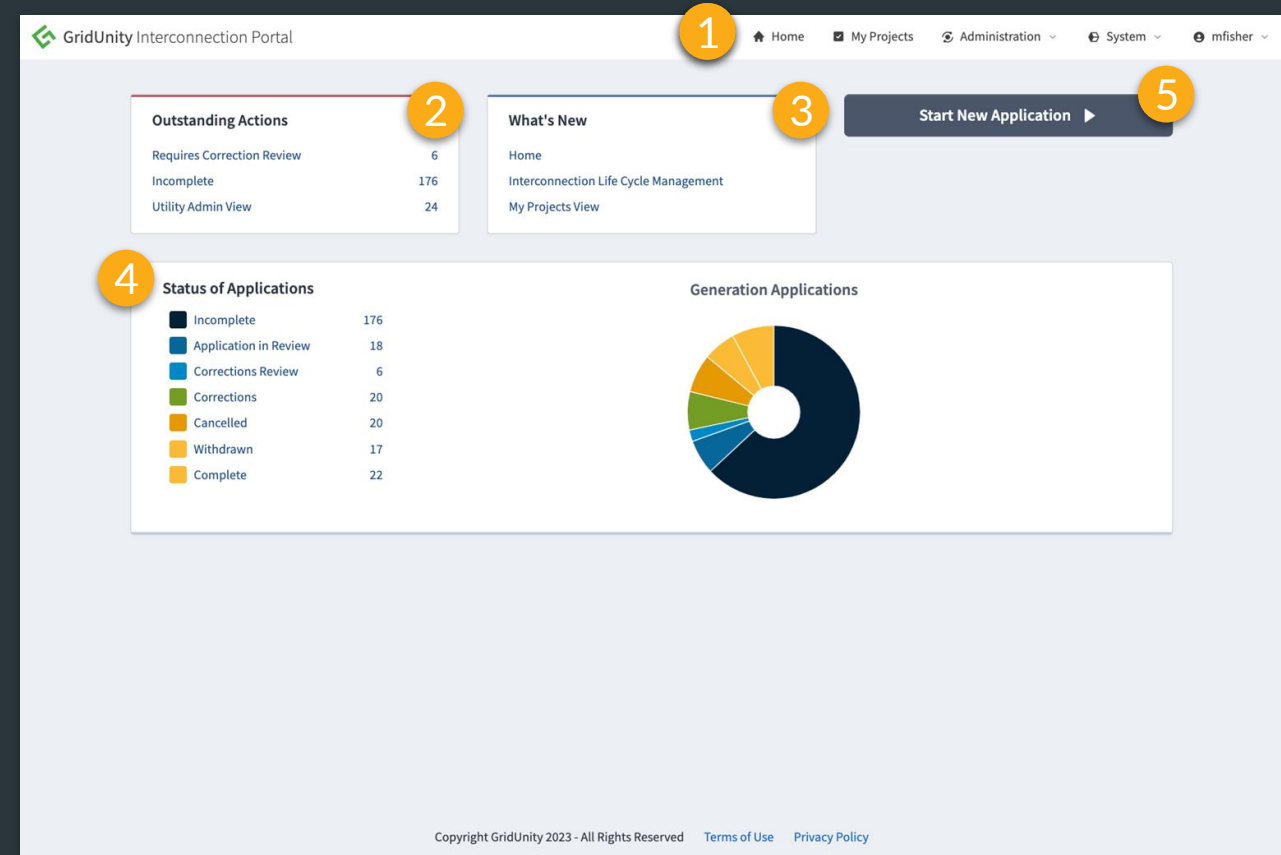
Quick access to new or important system or business process information.

4. Status of Applications Dashboard

Configurable view of applications summarized by status category including links to My Projects page view filtered by that status.

5. Start New Application

Button used to start new generation interconnection applications.



HOME SCREEN | GLOBAL NAVIGATION MENU

1. Home

Returns user to home/dashboard screen.

2. My Projects

Summary grid view of all projects the user has access to.

3. Administration

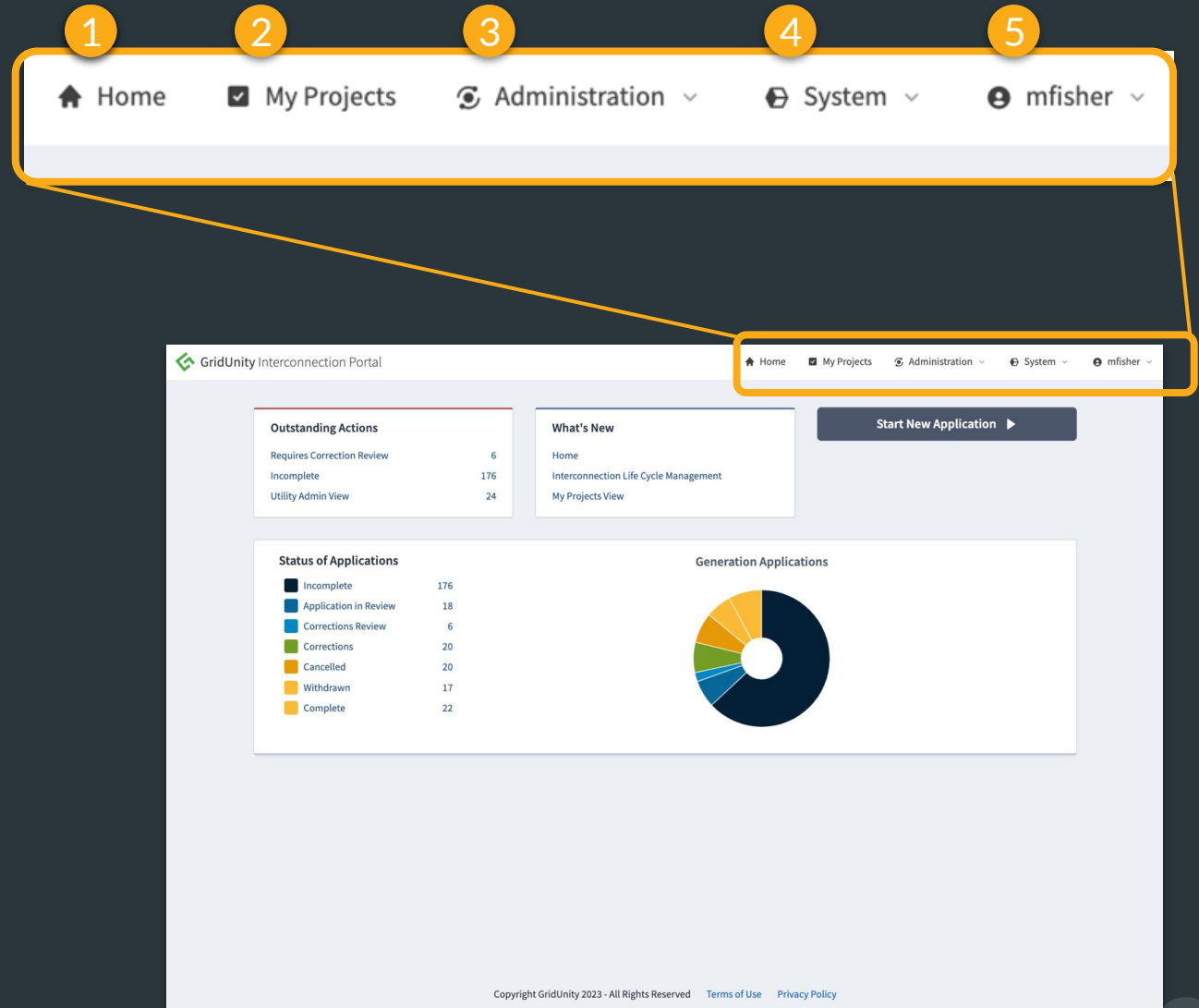
Only accessible to administrative user roles. Provides access to user management, company management and other administrative functions.

4. System

Only accessible to certain administrative user roles. Provides access to system configuration settings.

5. Account

Provides access to account details, address book, and sign out function. Also provides user options to Join or Register a company.



ACCOUNT DETAILS

ACCOUNT DETAILS

GridUnity Interconnection Portal

Home My Projects Administration System mfisher

Account Details

Set account information

Account Details

- What would you like to change?

What would you like to change?

- Change email address
- Change password

Continue

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The Account Details screen provides the user with options to:

- Change email address
- Change password

ACCOUNT DETAILS | ADDRESS BOOK

GridUnity Interconnection Portal

Address Book

+ Add Contact

Quick Filter

First Name	Last Name	Company	Address	Email	Phone	Actions
Christopher	Culpepper	Customer Co.	27 Charles St New Orleans, LA 30583	chrisc@customerco.com	(555) 389-0258	...
Jamie	Johnson	Customer Co.	27 Charles St New Orleans, LA 30583	jamiej@customerco.com	(555) 389-0258	...
Moustafa	Abdelaziz	GridUnity	399 Boylston St Boston, MA 02116	moustafa.abdelaziz@gridunity.com	(555) 320-3849	...
Peyton	Davari	GridUnity	399 Boylston St Boston, MA 02116	peyton.davari@gridunity.com	(555) 320-3849	...

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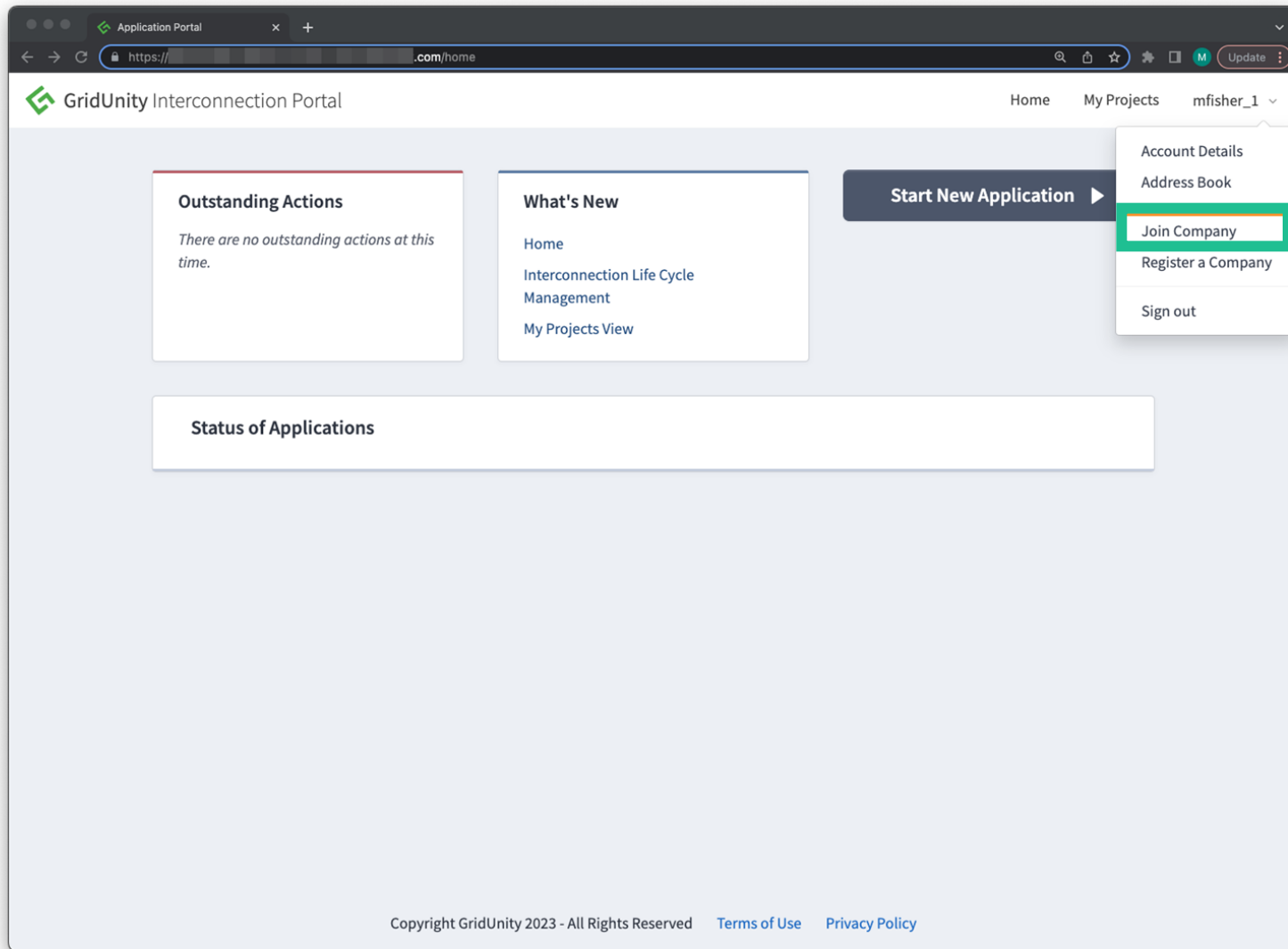
Privacy Policy

The **Address Book** provides a view of user's contact information as provided when the user registered.

This information is also used when using the "Copy From" feature in the Contact Information section of the application submission process.

COMPANY MANAGEMENT

COMPANY MANAGEMENT | JOIN A COMPANY



To request to join an existing company as a member:

Click your User Name in global navigation menu bar, then click *Join Company*.

COMPANY MANAGEMENT | JOIN A COMPANY

1. Type to search or click dropdown list to select a company to join.
2. Submit request.
3. An email will be sent to the company administrator prompting them to review and approve your request.
4. You will receive an email with the results.

GridUnity Interconnection Portal

Join a Company

Select Company

Company

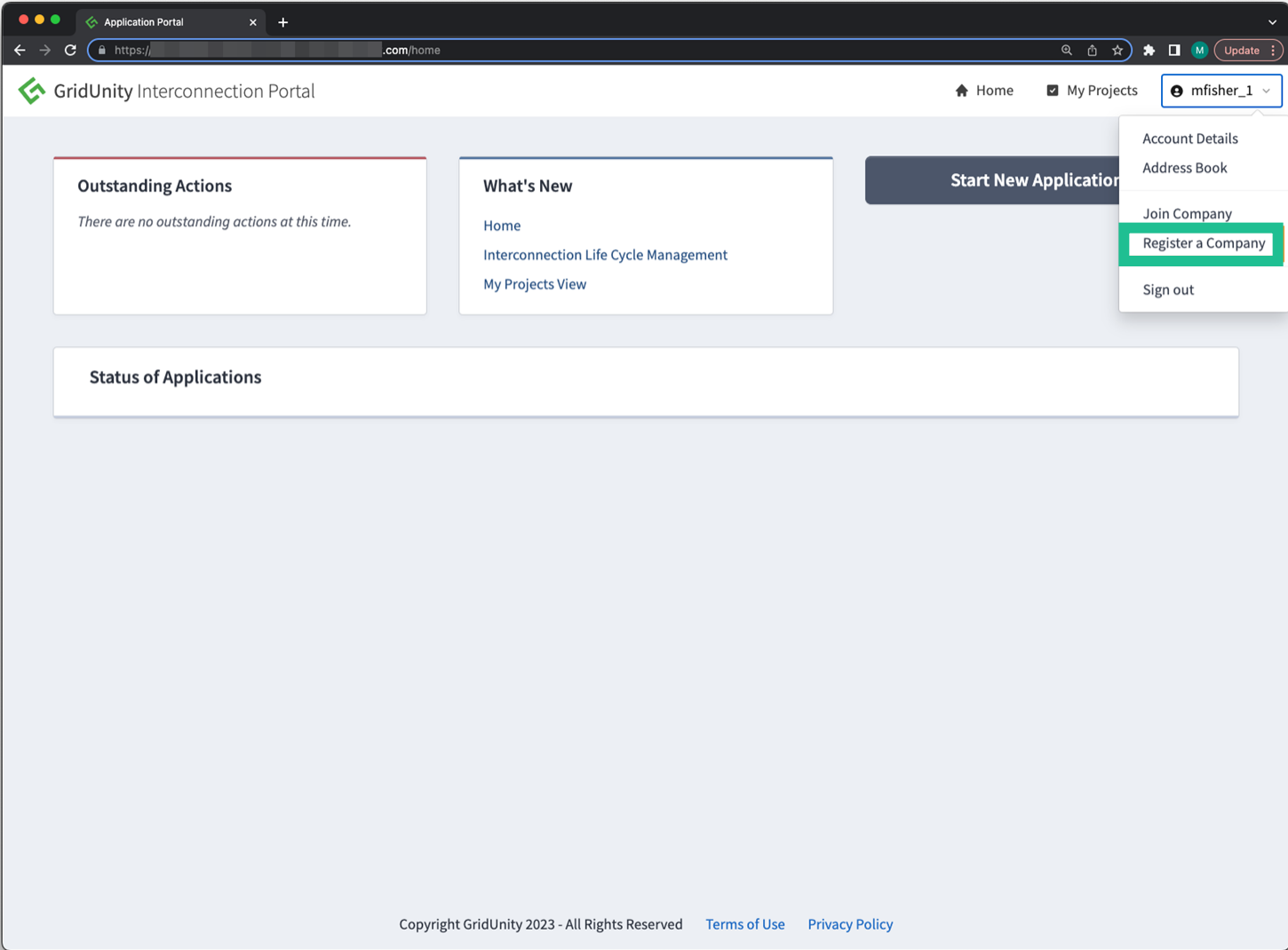
Please select or start typing

Warning: Once you join a company, your account can be disabled by the company administrator and it is not possible to leave a company once you have joined

Submit Request

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COMPANY MANAGEMENT | REGISTER A COMPANY



The screenshot displays the GridUnity Interconnection Portal interface. The browser address bar shows the URL <https://.com/home>. The page header includes the GridUnity logo, the text "GridUnity Interconnection Portal", and navigation links for "Home", "My Projects", and a user profile dropdown for "mfisher_1". The user profile dropdown menu is open, showing options: "Account Details", "Address Book", "Join Company", "Register a Company" (highlighted with a green border), and "Sign out". The main content area features three sections: "Outstanding Actions" with the message "There are no outstanding actions at this time.", "What's New" with links for "Home", "Interconnection Life Cycle Management", and "My Projects View", and "Status of Applications". A "Start New Application" button is visible in the top right. The footer contains the text "Copyright GridUnity 2023 - All Rights Reserved" and links for "Terms of Use" and "Privacy Policy".

To request to register a new company in the portal, click your User Name in the global navigation bar, then click **Register a Company**.

COMPANY MANAGEMENT | REGISTER A COMPANY

1. Fill in company details
2. Click ***Submit for Approval***.
3. An email is sent to the system administrator to review and approve/deny your company registration request.
4. You will receive a separate email with the results.

The screenshot displays the 'Company Registration' page on the GridUnity Interconnection Portal. The page title is 'Company Registration' and the sub-header is 'Create a Company'. The form contains the following fields:

- Company Name
- Company Primary Email
- Address
- City
- State (dropdown menu with 'Please select a' visible)
- Zip
- Phone (format: () - -)

A 'Submit for Approval' button is located at the bottom right of the form. A green callout bubble with the number '1' points to the form fields, and another green callout bubble with the number '2' points to the 'Submit for Approval' button.

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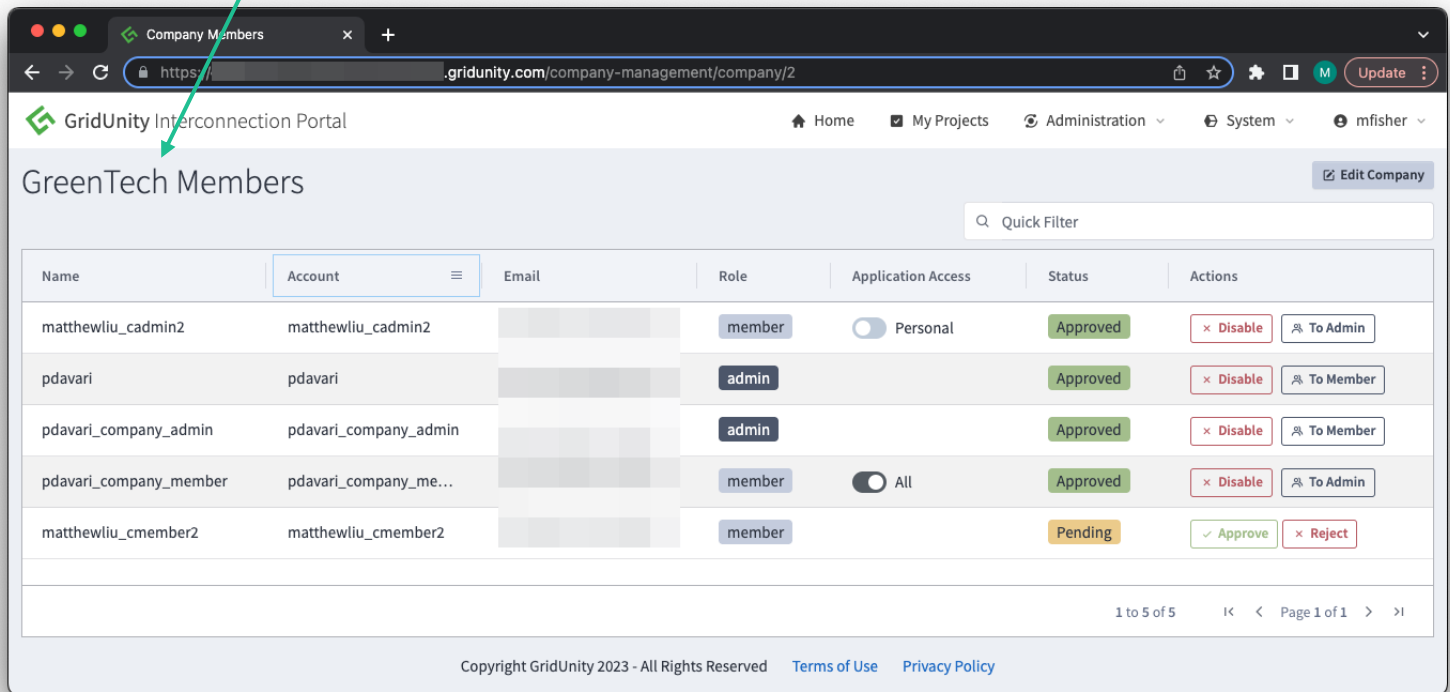
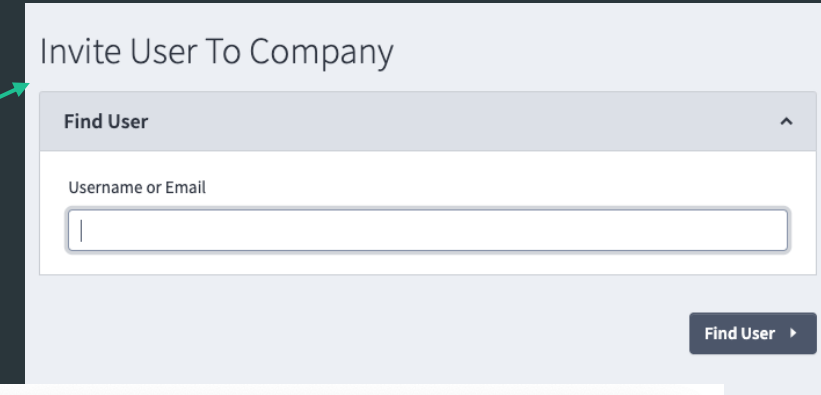
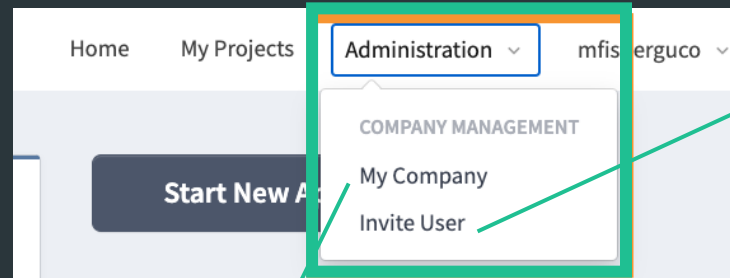
COMPANY MANAGEMENT | ADMINISTERING A COMPANY

Once you register a company, you become the administrator of that company and can manage your company through the Administration menu.

Here you can:

- Edit company details
- Invite new members to your company
- Manage membership and member access to company projects

Note: You can also be promoted to be a company administrator by the acting company admin after you join a company as a member.



COMPANY MANAGEMENT | ADMINISTERING A COMPANY

To manage company membership and access levels, visit the **My Company** page. Here you can:

1. Search, sort, filter, and view company member details
2. Toggle each member's access between personal and all company projects
3. Approve / reject new company join requests
4. Disable members
5. Promote other members to have Company Admin responsibilities

GridUnity Interconnection Portal

Home My Projects Administration System mfisher

GreenTech Members

Quick Filter

Name	Account	Email	Role	Application Access	Status	Actions
matthewliu_cadmin2	matthewliu_cadmin2		member	<input checked="" type="checkbox"/> Personal	Approved	<input type="button" value="x Disable"/> <input type="button" value="To Admin"/>
pdavari	pdavari		admin		Approved	<input type="button" value="x Disable"/> <input type="button" value="To Member"/>
pdavari_company_admin	pdavari_company_admin		admin		Approved	<input type="button" value="x Disable"/> <input type="button" value="To Member"/>
pdavari_company_member	pdavari_company_me...		member	<input type="checkbox"/> All	Approved	<input type="button" value="x Disable"/> <input type="button" value="To Admin"/>
matthewliu_cmember2	matthewliu_cmember2		member		Pending	<input type="button" value="Approve"/> <input type="button" value="x Reject"/>

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COMPANY MANAGEMENT | EDITING COMPANY PROPERTIES

Company administrators can edit their company's details by clicking Edit Company from the My Company page.

The screenshot displays the GridUnity Interconnection Portal interface. At the top, there's a navigation bar with 'Home', 'My Projects', 'Administration', 'System', and a user profile 'mfisher'. Below this, the page title is 'GreenTech Members'. A table lists members with columns for Company, Name, Account, Email, Type, Application Access, Status, and Actions. An 'Edit Company' button is visible in the top right corner of the table area. A modal form titled 'Edit Company' is open in the foreground, containing the following fields:

- Company Name: GreenTech
- Company Primary Email: [redacted]@gridunity.com
- Address: 1709 Broderick St
- City: San Francisco
- State: CA
- Zip: 94115
- Phone: (415) 822-5337

A 'Save' button is located at the bottom right of the modal. A green arrow points from the 'Edit Company' button in the table to the modal form.

APPLICATION SUBMISSION

APPLICATION SUBMISSION

Start New Generation Interconnection button from the Home screen allows a user to proceed to the Program Selection screen to select the application request type to be entered.

The screenshot displays the SPP Southwest Power Pool Home screen. The navigation bar includes 'Home', 'Administration', and 'System'. The main content area features several widgets:

- Outstanding Actions:** A table showing 261 Incomplete and 65 Complete actions.
- What's New:** Links to 'Home' and 'My Projects View'.
- Start New Generation Interconnection:** A prominent button with a play icon, highlighted by a red box and a blue callout.
- Status of Applications:** A table listing application statuses and their counts.
- Generation Interconnection Requests:** A donut chart visualizing the distribution of application statuses.

Status	Count
Incomplete	261
Complete	65

Status	Count
Incomplete	261
Application in Review	14
Corrections	14
Cancelled	5
Withdrawn	8
Complete	65

Status	Count
Incomplete	261
Application in Review	14
Corrections	14
Cancelled	5
Withdrawn	8
Complete	65

APPLICATION SUBMISSION

Start Generation Interconnection Intake is the first activity within the application submission process. Two categories define the Interconnection Request:

1. Program type of the interconnection request
2. The Service Type for the request

The screenshot shows the SPP Southwest Power Pool application submission interface. The header includes the SPP logo and navigation links: Home, My Projects, Administration, System, and a user profile for dan.fahy. The main heading is "Start Generation Interconnection Intake". Below this, there are two main categories, 1 and 2, each with a list of options. Category 1 includes: New Generating Facility (For IC customers with a Proposed New Generating Facility), Modifications to Existing Facilities (Increase in generating capacity or Material Modification of an Existing Generating Facility), Replacement with no Increase (Replacement of Existing Generating Facility with no increase in capacity), Surplus Service (Generating Facility requesting Surplus Interconnection Service), and Fast Track (Fast Track Process for Small Generating Facility). Category 2 includes: ERIS (Energy Resource Interconnection Service), NRIS (Network Resource Interconnection Service), and E-NRIS (External Network Resource Interconnection Service). A "Submit" button is located at the bottom right of the interface.

Category	Option	Description
1	New Generating Facility	For IC customers with a Proposed New Generating Facility
	Modifications to Existing Facilities	Increase in generating capacity or Material Modification of an Existing Generating Facility
	Replacement with no Increase	Replacement of Existing Generating Facility with no increase in capacity
	Surplus Service	Generating Facility requesting Surplus Interconnection Service
	Fast Track	Fast Track Process for Small Generating Facility
2	ERIS	Energy Resource Interconnection Service
	NRIS	Network Resource Interconnection Service
	E-NRIS	External Network Resource Interconnection Service

FACILITY INFORMATION

Facility Information activity captures pertinent information of the facility:

- Facility Name and Location
 - Latitude/Longitude
- Installed Generating Facility Capacity
- Net Output as measured at POI
- New or Existing Service
- Station Service
- POI

TRANSMISSION APPLICATION

- > Program Selection
- ▶ **Facility Information**
 - Facility Name
 - Facility Location
 - Installed Generating Facility Capacity
 - Net Output as measured at POI
 - New Service
 - Station Service
 - NRIS
 - Point of Interconnection

Facility Information

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
	N/A	1323		

[Project Details](#)

Facility Name

Project Common Name

CONTACT INFORMATION

Contact Information captures important contact information for Applicant and Agent:

- Contact information of applicant
- Digital Signature to designate a different document signer other than applicant
- Agent information if applicant has an agent
- Applicant Company information

TRANSMISSION APPLICATION

- > Program Selection
- ✓ Facility Information
- ▶ **Contact Information**
 - Contact Information
 - Digital Signature
 - Agent Information
 - Applicant Company
- Documentation and Legal Information
- Payment Information
- Facility Data
- Generator Information
- Application Review

Contact Information

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
Test	N/A	954		

[Project Details](#)

Contact Information

Select from Address Book

Please select or start typing

First Name **REQUIRED** Last Name **REQUIRED**

Title **REQUIRED** Company Name **REQUIRED**

Street Address **REQUIRED** Address 2

City **REQUIRED** State **REQUIRED** Zip Code **REQUIRED**

Please select a value

Phone **REQUIRED** Alt Phone Email **REQUIRED**

DOCUMENTATION AND LEGAL INFORMATION

Documentation and Legal Information captures relevant legal documents needed for the application process:

- State or Federal Tax Form (W-9)
- Operating Agreements (allow up to 5)
- Site Control documents

TRANSMISSION APPLICATION

- > Program Selection
- ✓ Facility Information
- ✓ Contact Information
- ▶ **Documentation and Legal Information**
 - State or Federal Tax Form
 - Operating Agreements
 - Site Control
- Payment Information
- Facility Data
- Generator Information
- Application Review


Documentation and Legal Information

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
Test	N/A	954		

[Project Details](#)


State or Federal Tax Form

W-9 Form ⓘ


 Choose a file for upload or drag and drop one into this area Not Uploaded

Operating Agreements

Operating Agreements 1 ⓘ

 Choose a file for upload or drag and drop one into this area Not Uploaded

Operating Agreements 2 ⓘ

 Choose a file for upload or drag and drop one into this area Not Uploaded

PAYMENT INFORMATION

Payment information captures how payment will be made, the calculated cost, and banking information:

- **Payment Type**
- LOC, ACH/Wire
- **Payment Calculation**
 - Program selection
- **Banking Information**

TRANSMISSION APPLICATION

- > Program Selection
- ✓ Facility Information
- ✓ Contact Information
- ✓ Documentation and Legal Information
- ▶ **Payment Information**
 - Payment Type
 - Payment Calculation
 - Banking Information
- Facility Data
- Generator Information
- Application Review

Payment Information

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
Test	N/A	954		

[Project Details](#)

Payment Type

Payment Type **REQUIRED**

Letter Of Credit ACH/Wire Payment

Bank Name **REQUIRED**

Account Name **REQUIRED**

ABA/Routing Number **REQUIRED**

Account Number **REQUIRED**

Contact Email **REQUIRED**

Payment Calculation

Application Fee

Study Deposit

Commercial Readiness Deposit

FACILITY DATA

Facility Data captures the facility data for the requesting application.

- Equipment Description
- Fuel Source
 - Single or multi-select

TRANSMISSION APPLICATION

- > Program Selection
- ✓ Facility Information
- ✓ Contact Information
- ✓ Documentation and Legal Information
- ✓ Payment Information
- ▶ **Facility Data**
 - Equipment Description
 - Fuel Source
- Generator Information
- Application Review

Facility Data

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
Test	N/A	954		

[Project Details](#)

Equipment Description

Description of entire Generating Facility **REQUIRED**

Commercial Operation Date **REQUIRED** Synchronization Date **REQUIRED** Interconnection Facilities required In-Service Date **REQUIRED**

Fuel Source

Fuel Source **REQUIRED**

Coal Natural Gas Nuclear Hydro Solar Wind Storage Other

Describe the equipment configuration for the entire Generating Facility: **REQUIRED**

GENERATOR INFORMATION

Generator Information captures information related to the Generators, Transformers, Tie Line and Impedance data, as well as One-Line and Model documentation.

- Unit Ratings (Generator Type)
 - Allows for 1 or more Generators
- Short Circuit Information
- Main Generator Set-Up Transformer
 - Allows for 1 or more GSU
- Pad Mount Transformer
 - Allows for 1 or more Transformers
- Tie-Line Information
 - Allows for 1 or more Tie-Lines
- System Equivalence Impedance Data for Wind/Photovoltaic plants
 - Allows for 1 or more Impedance Data
- Dynamic Modeling Information
- One-Line & Model Information

TRANSMISSION APPLICATION

- > Program Selection
- ✓ Facility Information
- ✓ Contact Information
- ✓ Documentation and Legal Information
- ✓ Payment Information
- ✓ Facility Data

Generator Information

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
Test	N/A	954		

[Project Details](#)

A. Unit Ratings

Number of Generator Types **REQUIRED**

Total Generator Rated Output (MW) **REQUIRED** Rated MVA **REQUIRED**

Number of Generating Units is how many of that specific type of generator there are of the same type

Generator Type #1

Number of Generating Units **REQUIRED**

Individual Generator Rated Output (MW) **REQUIRED** Individual Generator Rated MVA **REQUIRED**

Individual MVAR's of Unit (MVAR)

Manufacturer **REQUIRED** Model **REQUIRED**

SYNCHRONOUS GENERATOR INFORMATION

Synchronous Generator Information captures information for Synchronous Generators. This section is only applicable when specific fuel sources are selected.

- Synchronous Generator
- Excitation System
- Turbine Governor
- Induction Generator

TRANSMISSION APPLICATION

- > Program Selection
- ✓ Facility Information
- ✓ Contact Information
- ✓ Documentation and Legal Information
- ✓ Payment Information
- ✓ Facility Data
- ✓ Generator Information
 - ▶ **Synchronous Generator Information**
 - Synchronous Generator Information
 - Synchronous Generator #1
 - Excitation System Information
 - Excitation System #1
 - Turbine Governor Information
 - Turbine Governor #1
 - Induction Generator Information

Synchronous Generator Information

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
Test	N/A	954		

[Project Details](#)

Synchronous Generator Information

Number of Generator Models **REQUIRED**

Synchronous Generator #1

×

Rated Generator Speed (rpm) **REQUIRED**

Maximum Turbine (MW) **REQUIRED**

NON-SYNCHRONOUS EQUIPMENT INFORMATION

Non-Synchronous Equipment Information allows to define two types of Non-Synchronous generators:

- Type 1, 2, 3
 - Non-Synchronous Generator information
- Type 4
 - Inverter-Based Parameters (e.g. Solar, Storage, Type 4 Wind Turbines)

Note: types can be multi-select

TRANSMISSION APPLICATION

- > Program Selection
- ✓ Facility Information
- ✓ Contact Information
- ✓ Documentation and Legal Information
- ✓ Payment Information
- ✓ Facility Data
- ✓ Generator Information
- ✓ Synchronous Generator Information
- ▶ **Non-Synchronous Equipment Information**
 - Non-Synchronous Generator Information

TRANSMISSION APPLICATION

- > Program Selection
- ✓ Facility Information
- ✓ Contact Information
- ✓ Documentation and Legal Information
- ✓ Payment Information
- ✓ Facility Data
- ✓ Generator Information
- ✓ Synchronous Generator Information
- ▶ **Non-Synchronous Equipment Information**
 - Inverter-Based Parameters (e.g. Solar, Storage Type 4 Wind Turbines)

Non-Synchronous Equipment Information

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
Test	N/A	954		

[Project Details](#)

What type of Non-Synchronous Generator do you have? **REQUIRED**

Type 1 2 3 Type 4

Non-Synchronous Generator Information

Wind Generators Information

Number of generators to interconnect pursuant to Interconnection Request

Non-Synchronous Equipment Information

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
Test	N/A	954		

[Project Details](#)

What type of Non-Synchronous Generator do you have? **REQUIRED**

Type 1 2 3 Type 4

Inverter-Based Parameters (e.g. Solar, Storage Type 4 Wind Turbines)

Number of inverters to be interconnected

Manufacturer Model Name

APPLICATION REVIEW

Application Review provides the applicant an opportunity to review all of the information entered on the application. The applicant should review all data fields for accuracy before agreeing to the Terms and Conditions and submitting the application.

The applicant can navigate back into any previous application activity via the breadcrumbs in the left page margin to make changes to the application before submission.

Note: screen shot represents a Test environment before Study Cycles are defined.

The screenshot displays the 'TRANSMISSION APPLICATION' interface. On the left, a navigation menu lists various sections: Program Selection, Facility Information, Contact Information, Documentation and Legal Information, Payment Information, Facility Data, Generator Information, Synchronous Generator Information, and Non-Synchronous Equipment Information. The 'Application Review' section is highlighted with a red box and contains a sub-item 'Terms and Conditions'. The main content area is titled 'Application Review' and features a table with the following data:

Project Name	Project Number	Reference Number	Study Cycle Name	Application Deadline Date
Test	N/A	954		

Below the table is a 'Project Details' link. Two informational messages are displayed: a red message stating 'This application cannot be submitted at this time. There is no Active Cycle' and a blue message stating 'The application summary acts as a final review prior to application submission. All application values are grouped by Activity and Section to guide the user through their review.' The interface also shows two expandable sections: 'Program Selection' with fields for Request Type (New Generating Facility) and Service Type (ERIS), and 'Facility Information' with a field for Facility Name.

PROJECT DETAILS

The **Project Details** page provides both summary and detailed information, and displays the progress of the Interconnection Application.

Access to this view depends on a user's affiliation with the project and permissions in the system.

Tabs in this view are available based on user permissions and provide the user with various actions to view regarding the application.

The **Completeness Review** action is initiated from this page.

The screenshot displays the 'Project Details' page. On the left, there are three summary sections: 'Status', 'Project', and 'Facility Details'. The 'Status' section shows Project ID 954, Status 'Application in Review', Submitted Date '2024-07-10 10:37:22', and Validated Date 'N/A'. The 'Project' section shows Request Type 'Proposed new Generating Facility', Service Type 'Energy Resource Interconnection Service', Project Name 'Test', and Gen Number 'N/A'. The 'Facility Details' section shows Facility Address '23 B St LITTLE ROCK, AR, 72202' and Proposed Size '1 MW'. Below these is a 'Transmission Owner' section. On the right, there is a navigation bar with tabs for Progress, Deadlines, Comments, Documents, Email, History, Actions, Edit Json, and Access. The main content area is divided into two sections: 'Transmission Application' and 'Completeness Review'. The 'Transmission Application' section contains a table with 10 rows of activities, each with a completion date. The 'Completeness Review' section contains a single row for 'Completeness Review' with a status of 'In Progress'.

#	Activity	Date Completed
1	Program Selection	
2	Facility Information	2024-07-10 09:40:42 AM
3	Contact Information	2024-07-10 09:45:44 AM
4	Documentation and Legal Information	2024-07-10 09:51:37 AM
5	Payment Information	2024-07-10 10:29:43 AM
6	Facility Data	2024-07-10 10:29:48 AM
7	Generator Information	2024-07-10 10:29:51 AM
8	Synchronous Generator Information	2024-07-10 10:29:55 AM
9	Non-Synchronous Equipment Information	2024-07-10 10:29:59 AM
10	Application Review	2024-07-10 10:37:20 AM

#	Activity	Date Completed
1	Completeness Review	In Progress

DOCUMENT UPLOAD/DOWNLOAD

UPLOAD CUSTOMER SIGNED AGREEMENT

Upload Customer Signed Agreement allows the customer to download the tariff form, review, sign the form.

Once the customer signs the form, they can upload the signed agreement form.

This process is initiated using the Actions tab in the Project Details view of the application.

- Upload Customer Signed Agreement action
- Download the agreement to be signed
- Upload the signed agreement

The screenshot shows the 'Project Details' page for Project ID 954, which is in a 'Complete' status. The 'Actions' tab is selected, and the 'Upload Customer Signed Agreement' option is highlighted with a red border. Other tabs include Progress, Deadlines, Comments, Documents, Email, History, Edit Json, and Access. The 'Attach Documents' section is also visible, with a button to 'Attach Documents'.

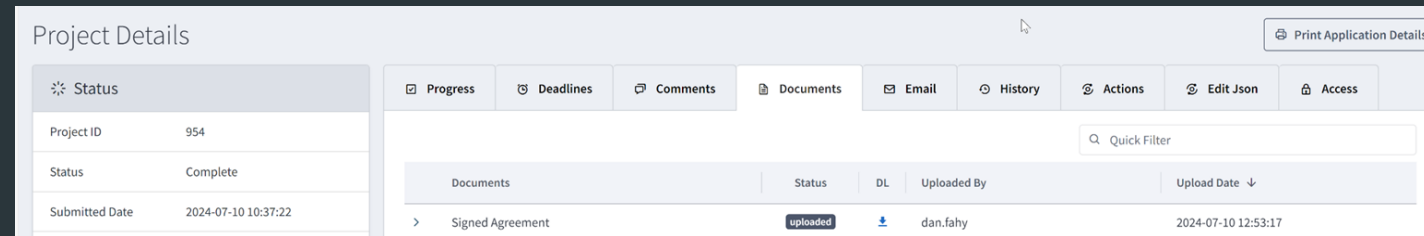
The screenshot shows the 'Download Unsigned Agreement' page. On the left, under 'UPLOAD TRANSMISSION AGREEMENT', the 'Download Unsigned Agreement' option is selected. The main content area shows a table with columns for Project Name, Project Number, Reference Number, Study Cycle Name, and Application Deadline Date. Below the table, it states 'Attached is a PDF copy of the unsigned study agreement.' and provides a 'Click here to download!' link. A 'Submit' button is located at the bottom right.

The screenshot shows the 'Upload Agreement' page. On the left, under 'UPLOAD TRANSMISSION AGREEMENT', the 'Upload Agreement' option is selected. The main content area shows a table with columns for Project Name, Project Number, Reference Number, Study Cycle Name, and Application Deadline Date. Below the table, there is a 'Customer Signed Agreement' field marked as 'REQUIRED'. A file upload area is provided with the text 'Choose a file for upload or drag and drop one into this area' and a 'Not Uploaded' status. A 'Submit' button is located at the bottom right.

FULLY EXECUTED SIGNED AGREEMENT

Once the tariff form is fully executed (signed by the Customer and SPP) the document can be found under the **Documents** tab on the **Project Details** page of the application.

The fully executed document will be titled **Signed Agreement**.



The screenshot displays the 'Project Details' page. On the left, a 'Status' sidebar shows: Project ID 954, Status Complete, and Submitted Date 2024-07-10 10:37:22. The main area has tabs for Progress, Deadlines, Comments, Documents, Email, History, Actions, Edit Json, and Access. The 'Documents' tab is active, showing a table with columns: Documents, Status, DL, Uploaded By, and Upload Date. A document titled 'Signed Agreement' is listed with status 'uploaded', uploaded by 'dan.fahy', and on '2024-07-10 12:53:17'. A 'Quick Filter' search bar is also visible.

Documents	Status	DL	Uploaded By	Upload Date
> Signed Agreement	uploaded		dan.fahy	2024-07-10 12:53:17

CORRECTIONS

COMPLETENESS REVIEW | CORRECTIONS

Applications that do not pass completeness review are sent back to the interconnection applicant for corrections.

This process is initiated by the system sending an email notification of the review results and required action.

The image shows a screenshot of an email notification from GridUnity Customer Engagement regarding a completeness review for an interconnection request application. The email is addressed to Michael Fisher and provides instructions on how to correct the application. Below the email, a screenshot of a web application interface titled 'Your Projects' is shown. The interface includes a search bar with the name 'fisher' and a table listing projects. An orange arrow points from the email content to the table.

Id	Project Number	Project Common Name	Status	Days Left	Actions
28680		Big Bear Solar	Correction	10	...
28474			Initiated		...
28029		NRIS Test	Initiated		...
27902		Sun Soaker 300	Initiated		...
27333			Suspended		...

COMPLETENESS REVIEW | CORRECTIONS

After clicking project ID on My Projects page, the Application Details page will allow the user to re-enter and edit the application to correct the flagged deficiencies.

Application Details

✨ Summary	
Application ID	28680
Project Number	Unassigned
Common Name	Big Bear Solar
Project Owner	SolarCo
Primary Contact	Michael Fisher
Project Developer	N/A
State	IL

📅 Project	
Status	Correction
Date Submitted	2023-05-23 09:13:53
Validated Date	N/A
Withdrawn Date	N/A
Signature	N/A

✉️ Transmission Owner	
TX Owner	Ameren Illinois

Progress Documents Email History Actions View JSON

Interconnection Application

#	Activity	Date Completed
1	Program Selection	2023-05-22 11:00:50 AM
2	Facility Information	In Progress
3	Contact Information	2023-05-22 11:05:57 AM
4	Documentation and Legal Information	2023-05-22 11:06:29 AM
5	Payment Information	2023-05-22 16:35:13 PM
6	Facility Data	2023-05-22 16:35:25 PM
7	Section A	2023-05-23 09:12:49 AM
8	Section C	2023-05-23 09:12:58 AM
9	Non Disclosure	2023-05-23 09:13:05 AM
10	Application Summary	2023-05-23 09:13:51 AM

COMPLETENESS REVIEW | CORRECTIONS

Upon re-entering application, system guides user to alert them to fields requiring corrections by displaying flag indicators as well as the reviewer's comments.

INTERCONNECTION APPLICATION

Facility Information

Appendix 1 to GIP 2, 3, 4.a, 4.b, 4.i, 4.m, 4.n, 4.o, 4.p

Project Name	Project Number	Reference Number	Study Group	Study Cycle Name	Application Deadline Date
Big Bear Solar		28680	Central	CEO-2022-Cycle2	2023-06-01

Project Common Name **REQUIRED**
Big Bear Solar

Facility Location

Address **REQUIRED**
1 Solar Way

City **REQUIRED** State **REQUIRED** Zip Code **REQUIRED**
Heyworth IL 61745

Latitude **REQUIRED** Longitude **REQUIRED**
40.3134 -88.9737
Does not match address. Does not match address.

Facility County

Fields need to be reviewed
You have 2 fields that have been marked for review. Please check and update them as needed.

Fields need to be reviewed
You have 2 fields that have been marked for review. Please check and update them as needed.

Heyworth IL 61745

Latitude **REQUIRED** Longitude **REQUIRED**
40.3134 -88.9737
Does not match address. Does not match address.

COMPLETENESS REVIEW | CORRECTIONS

Fields that have been corrected will display an updated flag icon and the prior value as well as reviewer comment remain accessible to the applicant for reference.

The screenshot displays a 'Facility Location' form with several fields. A 'Field Reviewed' popup is visible over the Latitude field. The popup contains the following information:

- Field Reviewed**
- VALUE FLAGGED FOR REVIEW: 40.3134
- REVIEW COMMENT: Does not match address.

The form fields and their values are:

- Address: [REDACTED]
- Latitude: 40.3135 (with a checkmark icon and 'REQUIRED' label)
- Longitude: -88.9738 (with a checkmark icon and 'REQUIRED' label)
- State: IL (with a dropdown arrow and 'REQUIRED' label)
- Zip Code: 61745 (with 'REQUIRED' label)

COMPLETENESS REVIEW | CORRECTIONS REVIEW

Corrections Review acts as a second round of completeness review after the applicant has made changes.

Previously flagged fields that have been corrected by applicant are indicated accordingly.

Reviewer can see previous field value and comment for reference in Corrections Review process.

This process can continue iteratively until all issues are resolved.

TECHNICAL REVIEW

- ▶ **Technical Review**
 - Review
 - Contact Information
 - Agent Information
 - Applicant Information
 - Payment Information
 - Transmission Owner
 - Transmission Owner #1
 - BUS Number
 - Review Status
- ✓ Summary

FLAG	FIELD	VALUE	COMMENT
<input type="checkbox"/>	Project Name	Big Bear Solar	
<input type="checkbox"/>	Address	1 Solar Way	
<input type="checkbox"/>	City	Heyworth	
<input type="checkbox"/>	State	IL	
<input type="checkbox"/>	Zip Code	61745	
<input type="checkbox"/>	Latitude	40.3135	
<input type="checkbox"/>	Longitude	-88.9738	
Facility County #1			
<input type="checkbox"/>	State	IL	
<input type="checkbox"/>	County	McLean	
<input type="checkbox"/>	Site Map	File uploaded Download	
Installed Generating Facility Capacity			
<input type="checkbox"/>	Summer (MW)	200	
<input type="checkbox"/>	Summer (MVAR)	200	

Previous Review

PREVIOUS VALUE
40.3134

REVIEW FLAG
Yes

REVIEW COMMENT
Does not match address.

Field flagged in previous review

MY PROJECTS

MY PROJECTS

The My Projects page provides a summary view to all users for the projects they have access to.

My Projects functionality includes:

1. View customization via column selection, column order, sort, search, and preset filter functions
2. Access to individual Project Details via the ID hyperlink
3. Project data export (Excel or CSV file)
4. Accessing project-specific user actions

My Projects

PRESETS: No preset selected

Quick Filter

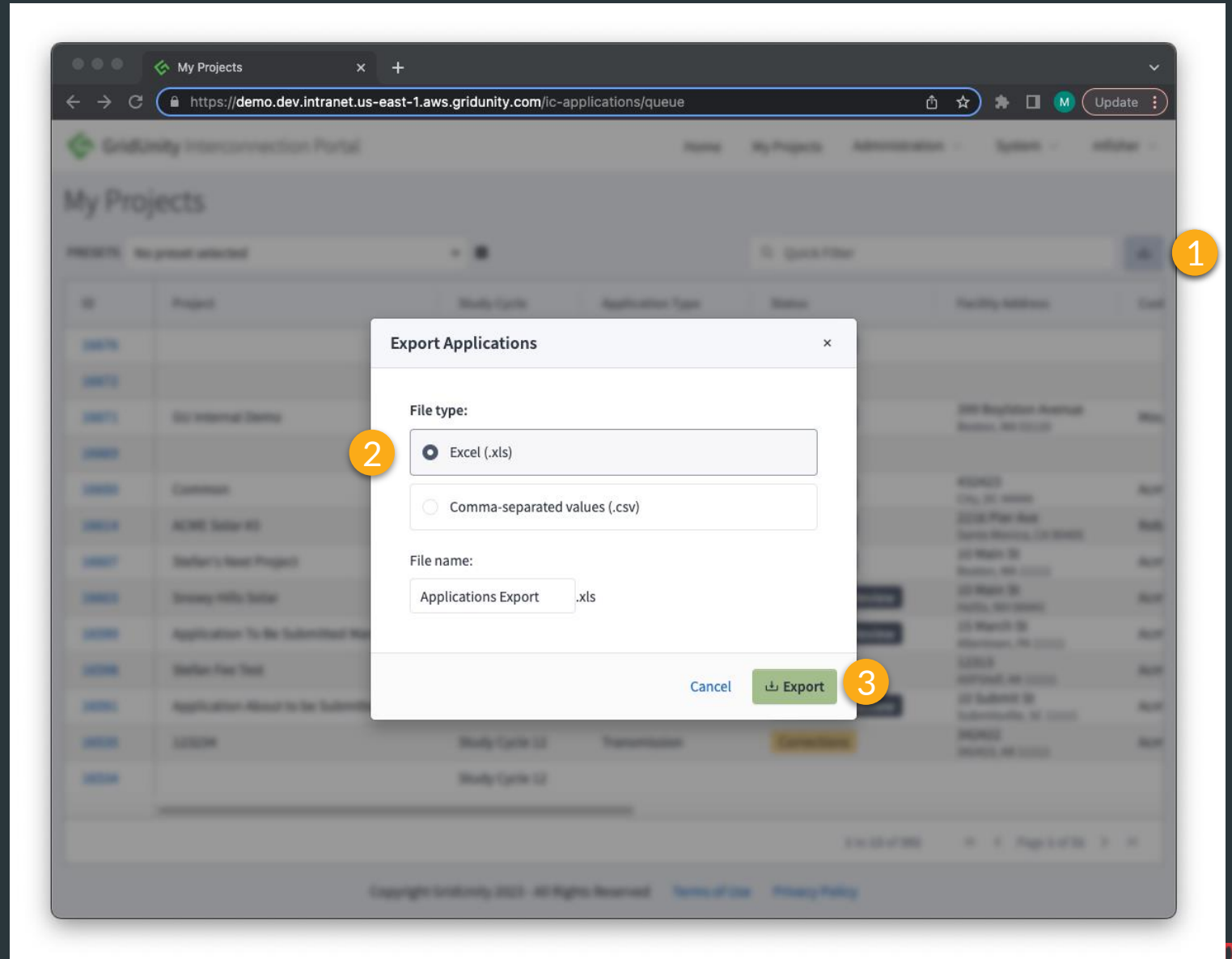
ID ↓	Project	Gen Number	Cycle	Request Type	Service Type	Status	Actions
895	Test Doc	GEN-2024-017		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...
893	test	N/A		Proposed new Generating Facility	Energy Resource Interconnection Service	Application	...
890	Test	GEN-2024-014		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...
885	Test	GEN-2024-015		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...
882	test	N/A		Fast Track Process for Small Generating Facility	Energy Resource Interconnection Service	Incomplete	...
880	test	N/A		Generating Facility requesting Surplus Interconnection Service	Surplus Interconnection Service	Incomplete	...
878	Test	N/A		Replacement of Existing Generating Facility with no increase in capacity		Incomplete	...
876	Test	N/A		Increase in generating capacity or Material Modification of an Existing Generating Facility	Energy Resource Interconnection Service	Incomplete	...
874		N/A		Generating Facility requesting Surplus Interconnection Service	Surplus Interconnection Service	Incomplete	...
872	Test	GEN-2024-013		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...
866	Test	N/A		Proposed new Generating Facility	Energy Resource Interconnection Service	Incomplete	...
863	Dan Test Proj	GEN-2024-012		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...

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MY PROJECTS | DATA EXPORT

Export data from the My Projects page by:

1. Clicking the export button,
2. selecting the export file type,
3. and clicking "Export".



MY PROJECTS | VIEW CUSTOMIZATION

View customization options on My Projects can be performed by:

1. Changing column order
2. Changing column selection
3. Application search
4. Filtering on column values

My Projects

PRESETS No preset selected +

Quick Filter

ID ↓	Project	Study Cycle	Application Type	Status	Facility Address	Customer Name	Customer Phone	Custo
16672		Study Cycle 12						
16671	GU Internal Demo	Study Cycle 12	Transmission	Incomplete	399 Boylston Avenue Boston, MA 02120	Moustafa Abdelaziz	(201) 888-4364	mous

1

My Projects

PRESETS No preset selected +

Quick Filter

ID ↓	Project	Study Cycle	Application Type	Status	Customer Name	Customer Phone	Custo
16672		Study Cycle 12					
16671	GU Internal Demo	Study Cycle 12	Transmission	Incomplete	Moustafa Abdelaziz	(201) 888-4364	mous
16669		Study Cycle 12			Acme Member	(555) 555-5555	stefar
16650	Common	Study Cycle 12	Transmission	Incomplete	Acme Member	(555) 555-5555	stefar
16614	ACME Solar #3	Study Cycle 12	Transmission	Incomplete	Robert Sherick	6263831963	rober
16607	Stefan's Next Project	Study Cycle 12	Transmission	Incomplete	Acme Member	(555) 555-5555	stefar
16603	Snowy Hills Solar	Study Cycle 12	Transmission	Application Review	Acme Member	(555) 555-5555	stefar
16599	Application To Be Submitted March 15	Study Cycle 12	Transmission	Application Review	Acme Member	(555) 555-5555	stefar

2

3

My Projects

PRESETS No preset selected +

Quick Filter

ID ↓	Project	Study Cycle	Application Type	Status	Customer Name	Customer Phone	Custo
16672		Study Cycle 12					
16671	GU Internal Demo	Study Cycle 12	Transmission	Incomplete	Moustafa Abdelaziz	(201) 888-4364	mous
16669		Study Cycle 12			Acme Member	(555) 555-5555	stefar
16650	Common	Study Cycle 12	Transmission	Incomplete	Acme Member	(555) 555-5555	stefar
16614	ACME Solar #3	Study Cycle 12	Transmission	Incomplete	Robert Sherick	6263831963	rober
16607	Stefan's Next Project	Study Cycle 12	Transmission	Incomplete	Acme Member	(555) 555-5555	stefar

4

MY PROJECTS | SAVING PRESET FILTERS

Once view customization has been configured, those settings can be saved as a Preset View Filter for easy, repeatable access. To save a preset filter:

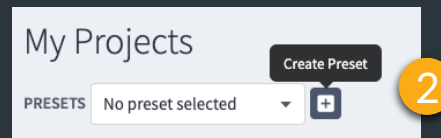
1. Filter/customize the page view as desired
2. Click the "+" to Create Preset
3. Name the preset and click the "✓" to save
4. Note: Preset filters can be saved to the My Projects page (config.ic-applications-presets) and/or to the home (dashboard) page (config.dashboard-outstanding-actions)
5. Presets can also be saved privately (only visible to acting user) or publicly (visible to all users)

My Projects

PRESETS No preset selected +

Quick Filter

ID ↓	Project	Study Cycle	Application Type	Status ▾	Facility Address	Customer Name	Customer Phone	Customer Email
16000	Homestead		Distribution	Application in Review	11 Pond Road Shelburne, VT 05482	Joe Smith	9999999999	michael.fisher@gridunity.com
15474	The Success Project		Generation	Application in Review	20 EPA St Boston, MA 02119	John		john.reda@testcompany@gridunity.com
15468	Wrench		Generation	Application in Review	123 Chenal Blvd Carlsbad, CA 92008	Test		peyton.davari@gridunity.com
15455	Project Scoreboard		Generation	Application in Review	123 Chenal Blvd Carlsbad, CA 92008	Test		peyton.davari@gridunity.com
15365	Code Talkers Project		Generation	Application in Review	123 Chenal Blvd Carlsbad, CA 92008	Test		test@test.com

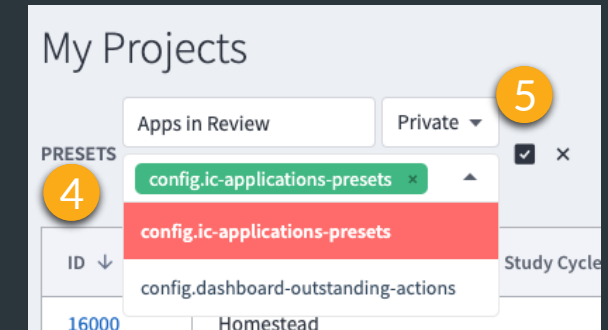


My Projects

PRESETS Apps in Review Private Public ✓ x

config.ic-applications-presets

ID ↓	Project	Study Cycle	Application Type	Status ▾
16000	Homestead		Distribution	Application in Review
15474	The Success Project		Generation	Application in Review
15468	Wrench		Generation	Application in Review
15455	Project Scoreboard		Generation	Application in Review
15365	Code Talkers Project		Generation	Application in Review
15300	Duraflame Project		Generation	Application in Review
15293	Project Elevate Training		Generation	Application in Review
15285	Coder Chaos		Generation	Application in Review
15283	Project Over Achievers		Generation	Application in Review
15228	Quicksilver		Generation	Application in Review



MY PROJECTS | USER ACTIONS

User Actions are manually initiated tasks a user (internal or external) can execute on an application. A user's role and privileges determine which User Actions can be accessed.

User actions are available via the Actions column on a per project basis on the My Projects page.

Note: User Actions are also accessible on the Project Details page (Actions tab)

My Projects

PRESETS No preset selected

Quick Filter

ID ↓	Project	Gen Number	Cycle	Request Type	Service Type	Status	Actions
895	Test Doc	GEN-2024-017		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...
893	test	N/A		Proposed new Generating Facility	Energy Resource Interconnection Service	Applicatio	...
890	Test	GEN-2024-014		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...
885	Test	GEN-2024-015		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...
882	test	N/A		Fast Track Process for Small Generating Facility	Energy Resource Interconnection Service	Complete	...
880	test	N/A		Generating Facility requesting Surplus Interconnection Service	Surplus Interconnection Service	Incomplete	...
878	Test	N/A		Replacement of Existing Generating Facility with no increase in capacity	Energy Resource Interconnection Service	Incomplete	...
876	Test	N/A		Increase in generating capacity or Material Modification of an Existing Generating Facility	Energy Resource Interconnection Service	Incomplete	...
874		N/A		Generating Facility requesting Surplus Interconnection Service	Surplus Interconnection Service	Incomplete	...
872	Test	GEN-2024-013		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...
866	Test	N/A		Proposed new Generating Facility	Energy Resource Interconnection Service	Incomplete	...
863	Dan Test Proj	GEN-2024-012		Proposed new Generating Facility	Energy Resource Interconnection Service	Complete	...

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Contact SPP's [Request Management System \(RMS\)](#)

Email: stakeholderrelations@spp.org