



# SMARTQ TUTORIAL

GENERATOR INTERCONNECTION

3 AUGUST 2022

*Helping our members work together to keep  
the lights on... today and in the future.*



SouthwestPowerPool



SPPorg



southwest-power-pool

# WELCOME TO SMARTQ

The following tutorial will offer you guidance on setting up and submitting your Generation Interconnection Requests with SPP utilizing our SmartQ Web Application. Here are some things you need to know, first:

- SmartQ is optimized for **Google Chrome** browser
- Your secure starting point is at <https://smartq.spp.org/login>
- At the bottom of the SmartQ main page are links to Tariff, forms and other documents that you should find helpful
- SmartQ uses multi-factor authentication

# SMARTQ WEB APPLICATION EVOLUTION

SmartQ is SPP Engineering Tariff Services initial release of a broader web application tool for all Tariff Studies. Presently, SmartQ is configured to submit:

- **Generator Interconnection Requests**, as described in the SPP Tariff Attachment V, Generator Interconnection Procedures.
- **Delivery Point Addition Requests**, as described in the SPP Tariff Attachment AQ, Delivery Point Addition Procedures.

In the coming months, we will be working to add or expand the following features to SmartQ;

- Full Customer Account Profile Set Up and Administration
- Robust features like auto alerts, triggers, deposit information and faster validation processing
- Data engine to drive the GI Queue web data; feed evolving Data Collection and Visualization plans for improved market information; and Modeling
- Migrate other Tariff Studies Application Processes, including all Generation Interconnection Special Studies and Transmission Service Studies

**READY TO GET STARTED?**

QUESTIONS? EMAIL US AT [SMARTQ@SPP.ORG](mailto:SMARTQ@SPP.ORG)

# SMARTQ ACCOUNT PROFILE SET UP

First sign up to create Account Profile. See **red** arrow

**SPP** Southwest Power Pool

**Log In**

Username

Password

Don't have an account? [Sign Up](#)  
[Forgot your password?](#)

**Log In**

**SmartQ Online Form Submission Tool**  
Generator Interconnection and Delivery Point Addition Requests

**Helpful Links**

[SmartQ Tutorial \(GI\)](#) • [SPP Tariff Attachment V](#) • [Appendix 3 Agreement and Attachment A, B and C Forms](#) • [GIR Checklist](#) • [Site Control Criteria](#) • [Submit RMS Ticket](#) • [Contact Us](#)

Copyright © 2020 Southwest Power Pool, Inc. All rights reserved  
Confidential Information Authorized Access Only

**SPP** 5

# ENTER ACCOUNT PROFILE INFORMATION



## Account Set Up

Already have an account? [Log In](#)

Enter Your Account Information Here.

See Example to the left.

Password must contain a special character (like: !@#\$%^&\*~?).

Remember your account information for later use.

Click on **red** "Add User" button to proceed.

# ANSWER THREE SECURITY QUESTIONS

For enhanced security, you will be required to select, from a drop down menu, and answer three security questions.

Click on the **green** "Next" button to proceed.

### Choose Security Questions

In what city does your nearest sibling live? ✕

Nashville

What school did you attend for sixth grade? ✕

Anytown Elementary

What was your high school mascot? ✕

Cougar

Cancel Next

# CONFIRM SUBMISSION OF ACCOUNT PROFILE

## Confirm New User

Confirm the information displayed below. If anything is incorrect click "Cancel", otherwise click "Submit" to create the new user.

User Name	johnd
Long Name	John Doe
Email	johndoe@gmail.com

[Back](#) [Cancel](#) [Submit](#)

**After submitting your Account Profile and Security Questions, you will get a Confirm New User page**

**Click on the green "Submit" button to proceed.**



# SMARTQ VERIFICATION EMAIL

Upon submission of your SmartQ Account Profile request, you will receive a SmartQ Verification Email stating that SPP Engineering Support Staff will review the New User request and upon approval send an additional notification of approval.

- Please allow reasonable time for the approval
- SPP staff may contact you to verify your submission
- Make sure your email server does not block the [SmartQ@spp.org](mailto:SmartQ@spp.org) email address
- Following approval, you can then return to SmartQ and Log In

# CONGRATULATIONS – YOU MAY NOW LOG IN

Return to the SmartQ home page and click ctrl+F5 to refresh your browser. Enter your User Name and Password from your Account Profile Set Up, click on the **red** “Log In” button.



**Log In**

Don't have an account? [Sign Up](#)  
[Forgot your password?](#)

**Log In**

# VERIFICATION CODE FOR AUTHENTICATION



Watch for your Verification Code from SPP SmartQ, enter that code here !

Verify

Submit

After clicking on the **red** "Log In" button, you will be redirected to the Verify Code page. You will simultaneously receive a secure Verification Code via email. Enter that here and click on the **red** "Submit".

# YOUR SMARTQ USER DASHBOARD

Your SmartQ User Dashboard has four key areas:

- **Generator Interconnection** and **Delivery Point Addition**
- **Expandable tabs** that show the Generator Interconnection **or** Delivery Point Addition requests you have submitted and their status (Pending, Rejected, InProgress, Approved and ALL)
- **"Users"** – Basic information about Your User Profile.
- **"Create New Form"** button, where you initiate a new request, online, based on SPP Tariff Attachment V, using Appendix 3 and Attachment A, B, and C forms to Appendix 3

# SMARTQ USER DASHBOARD SCREENSHOT

To initiate your Online Application Form, click Generator Interconnection. The tab will be red when active. Click on "Create Request" in upper right of Dashboard.

SmartQ

GI Dashboard

Generator Interconnection

Delivery Point Addition

Users

Submissions Pending Review +

Rejected Submissions +

In Progress Submissions +

Approved Submissions +

All Submissions +

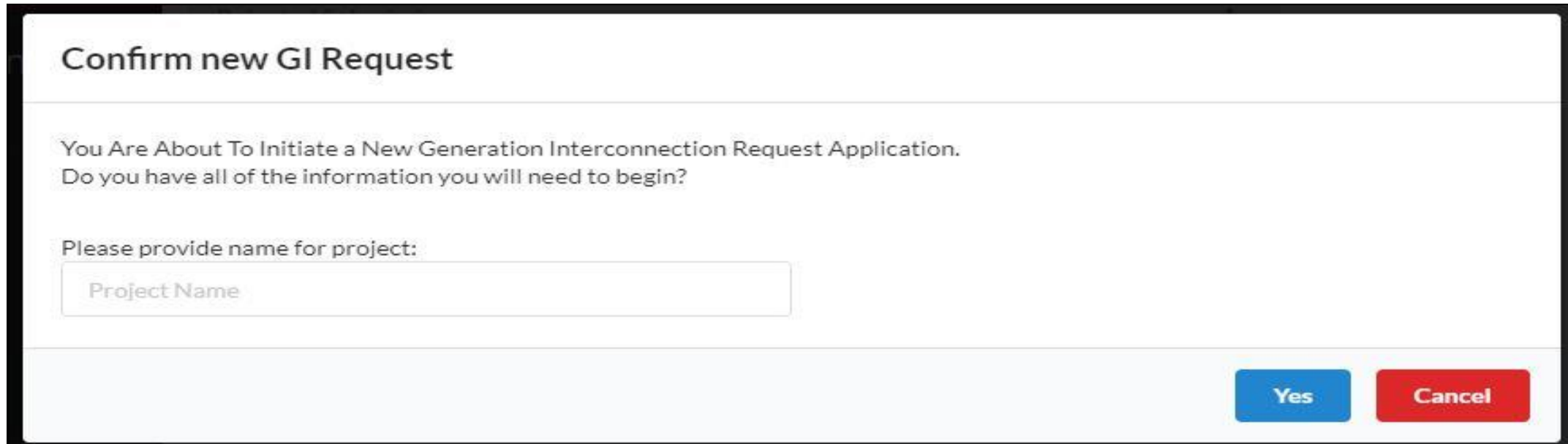
Create Request

SmartQ Tutorial (GI) • SPP Tariff Attachment V • Appendix 3 Agreement and Attachment A, B and C Forms • GIR Checklist • Site Control Criteria  
Submit RMS Ticket • Contact Us

# SMARTQ USER DASHBOARD SCREENSHOT

Each time you click on Create Request, it will ask you to provide the project name for your request.

Click on the **blue** “Yes” button to proceed.



The screenshot shows a dialog box titled "Confirm new GI Request". The text inside reads: "You Are About To Initiate a New Generation Interconnection Request Application. Do you have all of the information you will need to begin?". Below this is a prompt: "Please provide name for project:" followed by a text input field with the placeholder text "Project Name". At the bottom right of the dialog, there are two buttons: a blue "Yes" button and a red "Cancel" button.

# YOU'VE ARRIVED ! NEW SUBMISSION FORM PAGES

The screenshot displays the SmartQ web application interface. On the left is a dark sidebar with the SPP logo and 'SmartQ' text, and navigation options: 'Home' (highlighted in red), 'Create New Form', and 'Users'. The main content area shows a document viewer with a top navigation bar containing 'Appendix 3', 'Attachment A', 'Attachment B', and 'Attachment C'. Below this is a page navigation bar with 'Page 1' selected and pages 2 through 12. The document content is titled 'APPENDIX 3 TO GIP GENERATOR INTERCONNECTION STUDY AGREEMENT' and includes the following text:

Southwest Power Pool - Open Access Transmission Tariff, Sixth Revised Volume No. 1 - Attachment V Generator Interconnection Procedures (GIP) ... - Attachment V Appendix 3

APPENDIX 3 TO GIP

GENERATOR INTERCONNECTION STUDY AGREEMENT

THIS AGREEMENT is made and entered into this 31 day of MARCH 2020 by and between [ ] a [ ] organized and existing under the laws of the State of [ ] ("Interconnection Customer") and Southwest Power Pool, Inc. a non-profit organization under the laws of the State of Arkansas ("Transmission Provider "). Interconnection Customer and Transmission Provider each may be referred to as a "Party," or collectively as the "Parties."

RECITALS

WHEREAS, Interconnection Customer is submitting an Interconnection Request to interconnect its Generating Facility with the Transmission System or adding generating capacity addition to an existing Generating Facility as detailed in Attachment A to this Agreement; and

WHEREAS, Interconnection Customer has requested Transmission Provider to perform a Definitive Interconnection System Impact Study to assess the impact of its Interconnection Request to the Transmission System, and of any Affected Systems;

**Familiarize yourself with these form pages. All 22 pages of Appendix 3, and Attachments A, B and C to Appendix 3 are included in web form.**

**\*It may be of value to view the actual .pdf forms before getting started. Link can be found on the SmartQ Home page.**

Or click [HERE](#)

# WHAT YOU WILL BE FILLING OUT

SmartQ's Online Application tool to submit your Generation Interconnection Request (GIR) is drawn directly from SPP Tariff Attachment V, including the following Agreement and Forms.

- Appendix 3 to GIP "Generator Interconnection Study Agreement"
- Attachment A to Appendix 3
- Attachment B to Appendix 3
- Attachment C to Appendix 3

Within SmartQ's Online Application forms you will be required to upload attachments for various requirements. Additional information may be requested after your GIR Application is submitted and approved.



# TIPS ON COMPLETING YOUR GIR APPLICATION

Here are some tips and insights to help you in your Online GIR Application:

- Don't get overwhelmed by the pages, most of the online form is from Appendix 3 Study Agreement. Use the **NEXT** button at the bottom of each page to advance to the next online page, or the tabs at the top of the forms pages.
- Use the number "**0**" for numerical fields that are not applicable, and "**NA**" for text fields that are not applicable
- When attaching multiple files (like Site Control, etc.), you must ZIP them into a single file before uploading

# WHAT HAPPENS AFTER YOU SUBMIT YOUR REQUEST?

Upon Submission of your Generation Interconnection Request (GIR):

- There is a final Comment Box during the Submit process where you can add additional information or ask SPP staff questions regarding your application
- You'll receive an acknowledgement email after your Submission is completed
- SPP will review your Online GIR Application within a few days

If your GIR application is Approved, SPP will notify you of Approval along with your GI Queue Position number.

If your Online GIR Application is deficient, SPP will reject your Online GIR Application and notify you of the deficiency(ies):

- Using your Account Profile, you will then be able to go back into your Online GIR Application and correct or append request

# CAN I START MY APPLICATION AND FINISH IT LATER?

Yes !

- If you need to resume your GIR application later, you can simply return to SmartQ using your User Name and Password. On your User Dashboard, expand the "In Progress Submissions". Find your GIR Project. Click on the "eye" symbol. Navigate to the page where you left off and resume your Online Application.

# THANK YOU FOR USING SMARTQ

QUESTIONS?

EMAIL US AT [SMARTQ@SPP.ORG](mailto:SMARTQ@SPP.ORG)

OR, SUBMIT A HELP TICKET VIA SPP RMS TICKETING SYSTEM:  
[HTTPS://SPPRMS.ISSUETRAK.COM/LOGIN.ASP](https://spprms.issuetrak.com/login.asp)

# TARIFF SERVICES MANAGEMENT TEAM

BRAD FINKBEINER,

SUPERVISOR – TARIFF SERVICES / GENERATION  
INTERCONNECTION

# TARIFF SERVICES TEAM

## Business Services

<b>Engineering Finance (Cash and Securities, Daptiv Billing)</b>	<b>GI Request Process &amp; Application, GI Queue Mgt and DISIS Support</b>	<b>Consultant Management DISIS Studies Support</b>
Mitch Jackson	Audrey White	Erin Chism
<a href="mailto:mjackson@spp.org">mjackson@spp.org</a>	<a href="mailto:awhite@spp.org">awhite@spp.org</a>	<a href="mailto:echism@spp.org">echism@spp.org</a>



# TARIFF SERVICES TEAM

## Tariff Studies Team

<b>Costing Allocation Support</b> <b>Modeling Coordination</b> <b>Z2 Legacy Support</b>	<b>Facilities Studies and Generation Interconnection Agreement Support</b>	<b>Affected Systems / Interregional Coordinator</b>	<b>Generation Interconnection Agreement Management and DocuSign</b>
Katherine Rogers	Andy Barton	Daniel Clark	Stacy Brothers
<a href="mailto:krogers@spp.org">krogers@spp.org</a>	<a href="mailto:abarton@spp.org">abarton@spp.org</a>	<a href="mailto:dwclark@spp.org">dwclark@spp.org</a>	<a href="mailto:sbrothers@spp.org">sbrothers@spp.org</a>



# TARIFF SERVICES TEAM

## Tariff Services Team

<b>Supervisor, Tariff Services Team of the Generation Interconnection Department</b>	<b>Special Studies Process Lead (LOIS, Mods, Interims, Surplus, Retirement / Replacements); Automation Initiatives and Knowledge Management</b>
Brad Finkbeiner	Matt B. Jackson, Phd.
<a href="mailto:bfinkbeiner@spp.org">bfinkbeiner@spp.org</a>	<a href="mailto:mbjackson@spp.org">mbjackson@spp.org</a>







# MITCH JACKSON

Sr. Tariff Services Specialist

Responsible for tracking and business management activities of Engineering Study Deposits, Securities and Billing. As team lead, he provides oversight for other business services like Tempo, SmartQ and EFA applications, as well as Contract Administration.



# AUDREY WHITE

Tariff Services Specialist I

Generation Interconnection POC

GI Queue Management & Reporting

GI Validation and Acceptance Process



# **ERIN CHISM**

Tariff Services Specialist II

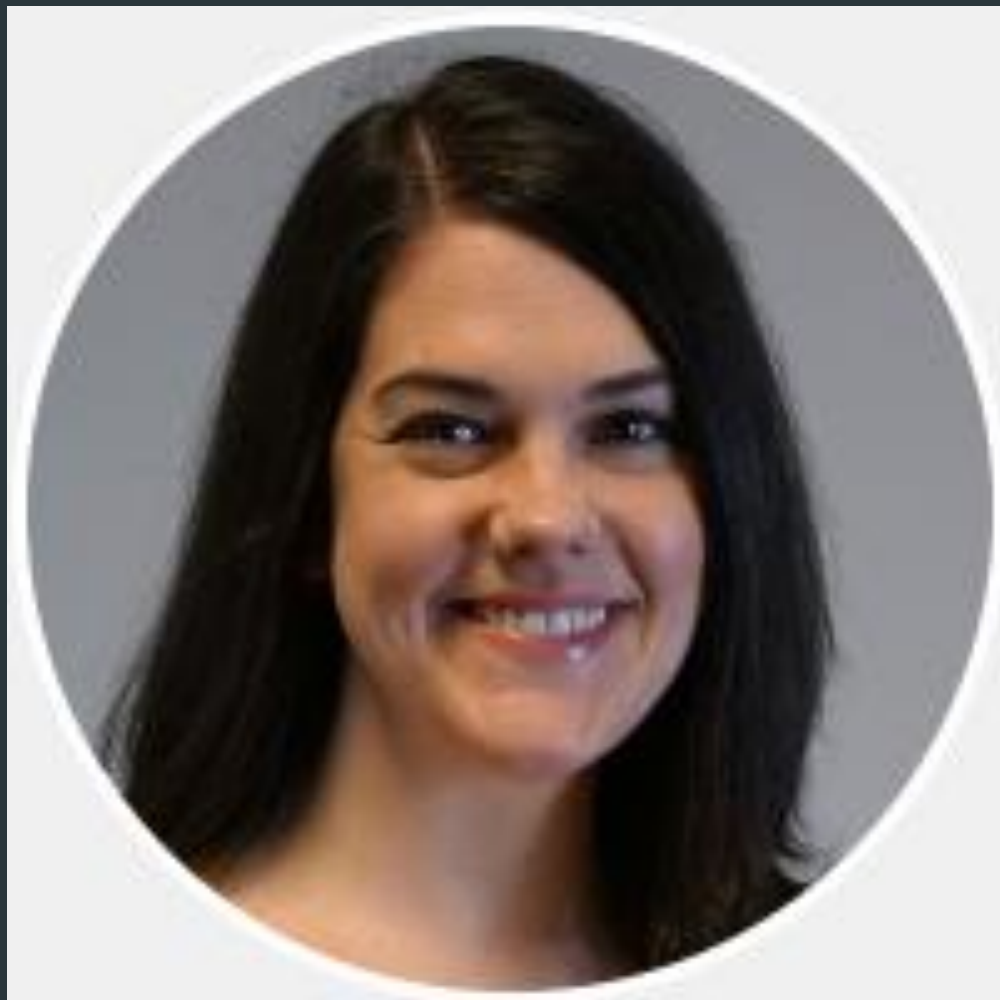
Leads the Consultant Management activities and provides Financial Management support; DISIS Studies Process Support



# MATT B JACKSON

Sr. Tariff Services Specialist

Leads the Special Studies Process Management (MODs, Turbine Restudies, POI Changes, LOIS, Gen Retirement, Gen Replacement, Surplus Studies, ASGIs, etc); Special Studies Queue Management and Reporting  
GI Automation Projects



# KATHERINE ROGERS

Sr. Tariff Services Specialist

As DISIS Studies Team Lead, Katherine provides oversight on GI Cost Allocation, Facilities and GIA Support; Modeling Coordination; and Z2/CSS Support



# **ANDY BARTON**

Tariff Services Specialist III

Facilities Studies Coordination lead and supports  
Generation Interconnection Agreement  
Management



# **DANIEL CLARK**

Tariff Services Specialist III

Affected Systems / Interregional Coordinator

\*Technical Support to GI Engineering



# **STACY BROTHERS**

Tariff Services Specialist II

Generation Interconnection Agreement  
Management; DocuSign Administration



# CONTACTS

**Brad Finkbeiner**

Supervisor, Tariff Services / Generation Interconnection  
501-688-1657 Email: [bfinkbeiner@spp.org](mailto:bfinkbeiner@spp.org)

**Tariff Services Management Team of the Generation Interconnection Department**

**Mitch Jackson**

Sr. Tariff Services Specialist,  
501-614-3542

[mjackson@spp.org](mailto:mjackson@spp.org)

**Engineering Finance Management  
Business Services Team Lead**

**Matt B. Jackson**

Sr. Tariff Services Specialist  
501-614-3251

[mbjackson@spp.org](mailto:mbjackson@spp.org)

**Special Studies Lead / GI Process Automation  
and Knowledge Management**

**Katherine Rogers**

Sr. Tariff Services Specialist  
501-482-2339

[kr Rogers@spp.org](mailto:kr Rogers@spp.org)

**Z2/CSS Support; Model Coordination  
Facilities Studies & SCERT / Cost Allocation**

**Audrey White**

Tariff Services Specialist I  
501-688-2531

[awhite@spp.org](mailto:awhite@spp.org)

**GI Applications/Validation  
GI Queue Management**

**Andy Barton**

Tariff Services Specialist III  
501-482-2138

[abarton@spp.org](mailto:abarton@spp.org)

**Generation Interconnection Agreements  
Facilities Studies & SCERT / Cost Allocation**

**Erin Chism**

Tariff Services Specialist II  
501-482-2057

[echism@spp.org](mailto:echism@spp.org)

**Consultant Management & DISIS Support**

**Daniel Clark**

Tariff Services Specialist III  
501-482-2202

[dclark@spp.org](mailto:dclark@spp.org)

**Affected Systems / Interregional Coordination**

**Stacy Brothers**

Tariff Services Specialist II  
501-482-2052

[sbrothers@spp.org](mailto:sbrothers@spp.org)

**Generation Interconnection Agreements**