

# Table of Contents

1. Application Status Definitions.....	1
2. Application Status Dates .....	3
3. Application Status Flow .....	4

## 1. Application Status Definitions

The following is a table that lists and defines each Application Status that a California Solar Initiative application may enter within PowerClerk. The list is arranged according to the chronological order in which the statuses would be entered by an application entering each.

<b>Application Status</b>	<b>Status Definition</b>
New Reservation Request	Application has been created by applicant but has not been submitted
Online Reservation Request Submitted	Application has been submitted online but the paper copy has not yet been received by Program Administrator.
Reservation Request Review	Paper copies of the Reservation Request Application and supporting documentation have been received and are under program administrator review. OR The application was in suspended state, the applicant submitted new information and Program Administrator is reviewing the reservation request documents.
Suspended – Reservation Review	Application has been reviewed and is incomplete. Notification of incomplete items has been sent to the appropriate parties. Program Administrator is waiting for additional information from applicant.
Pending RFP – Reservation Reserved (Gov’t/Non-Profit only)	Application has received conditional approval, funds have been conditionally reserved at the current incentive level and program administrator is waiting on applicant to submit the request for proposal or similar solicitation and proof of project milestone checklist.
RFP Review (Gov’t/Non-Profit only)	Program Administrator has received and is reviewing request for proposal or similar solicitation documentation and proof of project milestone checklist. OR The application was in suspended state, the applicant submitted new information and Program Administrator is reviewing the RFP documents.
Suspended – RFP Review	RFP has been reviewed and is incomplete. Notification of incomplete items has been sent to the appropriate parties. Program Administrator is waiting for additional information from the applicant.

Reservation Reserved	Application has received conditional approval, funds have been reserved at the current incentive level (or at the RFP – Reservation Reserved incentive level for Gov't/Non-Profit applications) and program administrator is waiting on applicant to submit the proof of project milestone package.
Online Proof of Project Milestones Submitted	Proof of Project Milestone has been submitted online but the paper copy has not yet been received by program administrator.
Proof of Project Milestones Review	Paper copies for Proof of Project Milestone and supporting documentation have been received and are under program administrator review. OR The Proof of Project Milestone was in suspended state, the applicant submitted new information and program administrator is reviewing the proof of project milestone documents.
Suspended – Milestone Review	Proof of project milestone packet has been reviewed and it is incomplete. Notification of incomplete items has been sent to the appropriate parties. Program Administrator is waiting for additional information from the applicant.
Confirmed Reservation	Application has been approved, and reservation amount has been confirmed. The Program Administrator is waiting for the applicant to submit the incentive claim form.
Online Incentive Claim Request Submitted	Incentive Claim Request has been submitted online but the paper copy has not yet been received by Program Administrator.
Incentive Claim Request Review	Paper copies of the Incentive Claim Request and supporting documentation have been received and are under review by Program Administrator. OR The Incentive Claim was in suspended state, the applicant submitted new information and Program Administrator is reviewing the incentive claim document. Any applications selected for inspection will remain in this state for the duration of the inspection process.
Suspended – Incentive Claim Request Review	Incentive claim form has been reviewed and it is incomplete. Notification of incomplete items has been sent to the appropriate parties. Program Administrator is waiting for additional information from the applicant. Applications that fail the inspection will be placed in this state after the applicant has been notified.
Pending Payment	EPBB – Incentive Claim has been approved and a payment request or invoice has been sent to Program Administrator's accounting department. The payment will be issued within 30 days.  PBI – Incentive claim has been approved and the letter requesting data from the PDP has been sent. Program Administrator is now waiting for PDP data in order to make first payment.
PBI – In Payment	PDP data has been received for at least the first PBI incentive payment. Payments will continue monthly based on PDP data for a total of 60 months.
Completed	Application incentive has been paid in full.

Cancelled	Application has been cancelled by program administrator.
Withdrawn	Application has been withdrawn by applicant or customer.
System Removed	An approved, installed system has been removed from the installation site.

## 2. Application Status Dates

The following is a table that describes the dates associated with each Application Status that a California Solar Initiative application may enter within PowerClerk. The list is arranged according to the chronological order in which the statuses would be entered by an application entering each.

<b>Application Status</b>	<b>Associated Status Date Description</b>
New Reservation Request	Date new application created online.
Online Reservation Request Submitted	Date application first submitted online.
Reservation Request Review	Date paper copy of application physically received by Program Administrator. OR Date additional information pertaining to Reservation Request is received by Program Administrator.
Suspended - Reservation Review	Date of clarification request from Program Administrator to appropriate parties resulting from incomplete Reservation Request.
Pending RFP - Reservation Reserved	Date provisional reservation reserved - pending RFP - and all notifications have been sent to the applicant.
RFP Review	Date paper copy of the RFP package is physically received by Program Administrator. OR Date additional information pertaining to RFP package is received by Program Administrator.
Suspended - RFP Review	Date of clarification request from Program Administrator to appropriate parties resulting from incomplete RFP package.
Reservation Reserved	Date reservation conditionally reserved for project (and RFP accepted for government, non-profit and public entity projects).
Online Proof of Project Milestones Submitted	Date Proof of Project Milestones submitted online.
Proof of Project Milestones Review	Date paper copy of Proof of Project Milestones physically received by Program Administrator. OR Date additional information pertaining to Proof of Project Milestones package is received by Program Administrator.
Suspended - Milestone Review	Date of clarification request from Program Administrator to appropriate parties resulting from incomplete Proof of Project Milestones package.
Confirmed Reservation	Date reservation for project confirmed; Reservation Request accepted for 2-step projects, and Proof of Project Milestones accepted for 3-step projects.

Online Incentive Claim Request Submitted	Date Incentive Claim Request form submitted online
Incentive Claim Request Review	Date Incentive Claim Request form physically received by Program Administrator. OR Date additional information pertaining to Incentive Claim Request is received by Program Administrator.
Suspended - Incentive Claim Request Review	Date of clarification request from Program Administrator to appropriate parties resulting from incomplete Incentive Claim Request.
Pending Payment	Date Incentive Claim Request has been approved as eligible for payment, and claim form forwarded to Program Administrator accounting department for payment. OR Date Incentive Claim Request has been approved, and a letter from the Program Administrator to appropriate parties requesting data from the Performance Data Provider has been sent.
PBI - In Payment	Date that first generation data was received to make the initial PBI payment.
Completed	Date that final incentive check was created and sent to Payee.
Cancelled	Date that an application was cancelled by the Program Administrator.
Withdrawn	Date that an application was withdrawn by the Applicant or Host Customer.
System Removed	Date that the system associated with an installed project was physically removed from the installation site.

### 3. Application Status Flow

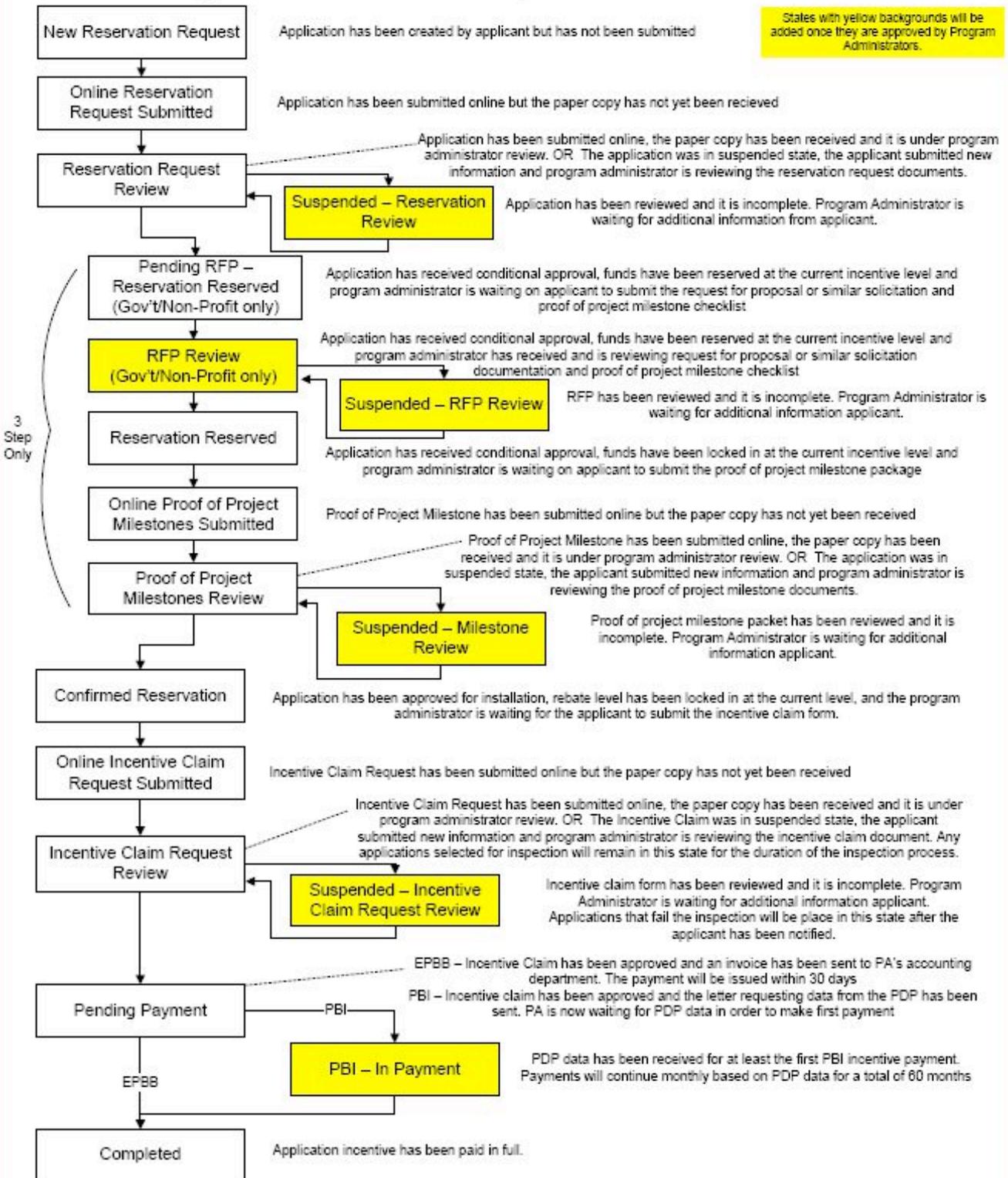
The following is a flowchart that diagrams the order in which a California Solar Initiative application will move through the Application Statuses in PowerClerk. The flowchart is arranged vertically, with arrows indicating the direction of movement through the application statuses. Brief descriptions are arranged to the right of each status.

The normal application status flow for 2-Step applications is indicated by the left-most statuses. Statuses shown offset from the left include both normal-flow statuses for 3-Step applications and statuses in which applications have been suspended, as indicated.

The three application statuses enclosed in gray beneath the flowchart are terminal statuses which may be entered from any of the other statuses.

Application statuses highlighted in yellow are statuses that have either been recently added to PowerClerk, or are currently pending addition to PowerClerk.

# CSI Application States Description and Flow



**These states can be transitioned to from any state**

<b>Cancelled</b>	Application has been permanently removed from the program	<b>Withdrawn</b>	Application has been permanently withdrawn from the program by applicant	<b>System Removed</b>	An approved and paid system that has been removed from the installation site
------------------	---	------------------	--	-----------------------	--