OREGON COMMUNITY SOLAR PROGRAM

Oregon Community Solar Program:

Participant Platform Overview and Enrollment Process

Presented by the Program Administration Team

Program Administration (PA) Team

Energy Solutions

Program Administration

Program Implementation Manual

Funds Management

Public Reporting

Education & Outreach

Coordination

Workshops and Demos

Platform Management

CSP Platform Configuration

Utility Integration

Data Security

EnergyTrust of Oregon

Program Administration

Project Review for Pre-certification and Certification

Installation Verification

Dispute Resolution

Education & Outreach

Project Manager Registration

Customer Support

Platform Management

Application Processing

QA/QC

Community Energy Project

Program Administration

Program Diversity Strategy

Education & Outreach

Low-Income Facilitator

Oregon Public Utility Commission

Program Administration

Regulatory Policy Development

Budget Management

Contract Management

Education & Outreach

Commission Workshops administration

Public Stakeholder Engagement

Agenda

Participant Enrollment

Overview of participant platform and overall enrollment process

Covered Today

- Project Finder for participants
- How to manually create a participant profile
- The requirements for participants:
  - Demographic survey
  - Utility Information and where to find it
  - Sizing documentation
- Future Consideration for Bulk Uploads and APIs

Not Covered Today

- Low-Income Waitlist
- Managing Moves, Transfers, and Terminations
- API Integration Details

Project Finder

Project Finder

**Information is populated from:
"Public Listing Information" in
the Company Profile**
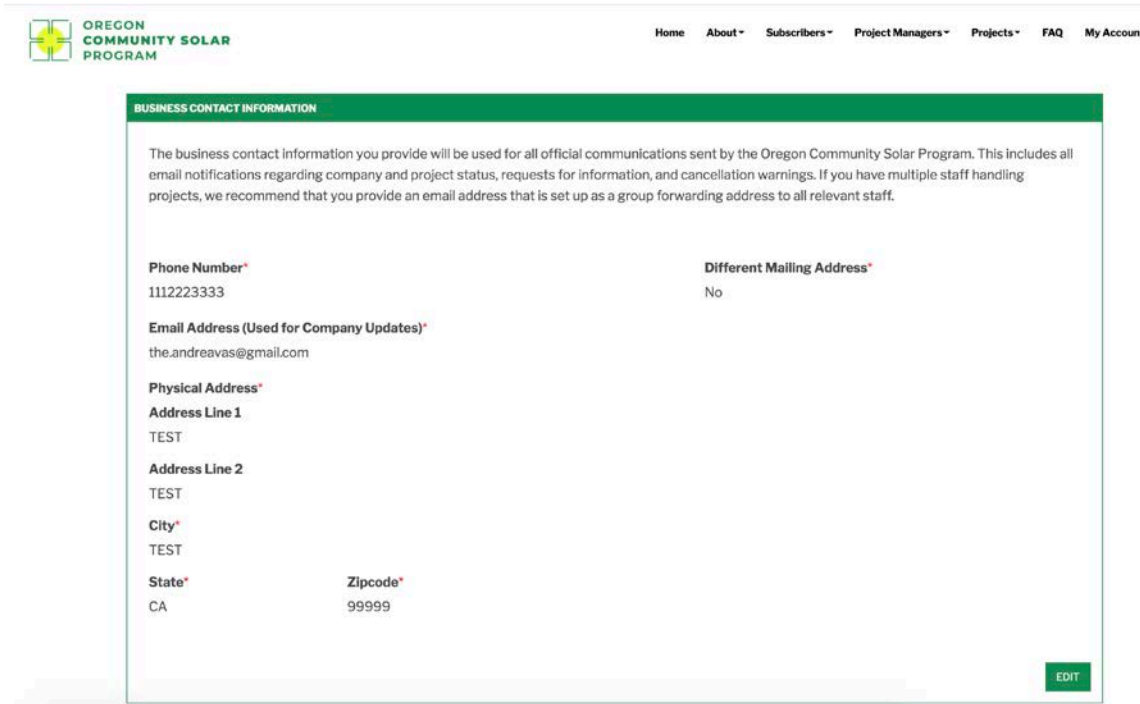
**PM mark a project as
"Accepting Participants"**

Participant Enrollment Guidance Document

- This resource covers:
  - Required participant information
  - Locating utility identifiers and customer energy consumption
  - Subscription sizing guidance
  - Verification process and documentation requirements

- Additional guidance pending on using platform to enter and use participant information

Available at **oregoncsp.org** under *Project Manager Resources*

Required Participant Information

- **Customer contact information**
  - Name (both First/Last and as it appears on bill)
  - Phone/Email/Address

- **Utility Account information**
  - Utility identifiers
  - Customer type

- **Subscription Information**
  - Community Solar Project
  - Pricing Product
  - Subscription Size
  - Consumption verification method

- **Demographic/Firmographic Information**

Locating Customer Information

Customer Account Information

Where: Customer utility bill

What:
- Account Number
- Meter Number
- Site Identifier
    - **PGE:** SPID
    - **PAC:** Item No.
    - **IPC:** Service Agreement No.
- Participant Rate Class

See guidance document for specific locations on customer bill for each utility.

Customer Consumption History

Where: Online utility portal (see guidance document for CSV download instructions)

What: Past monthly kWh consumption figures

See guidance document for CSV download instructions for each utility.

Note: Do not rely on CSV downloads for utility identifiers (especially for PGE customers), as these may refer to additional internal tracking numbers.

Subscription Sizing

Subscriptions are sized in kW-AC and are a function of:

- Annual participant energy consumption (kWh)
- Targeted community solar subscription percentage
- Expected CSP production (kWh per year per kW-AC)

Subscription size limits:

- Subscriptions may not exceed 100% of average annual consumption
- Subscription are recommended not to exceed 80% of average consumption

Annual kwh consumption

Expected solar kWh/kW/year

$$7{,}000 \times 80\% \,/\, 1{,}400 = 4$$

Subscription percentage target

Resulting kW-AC subscription size
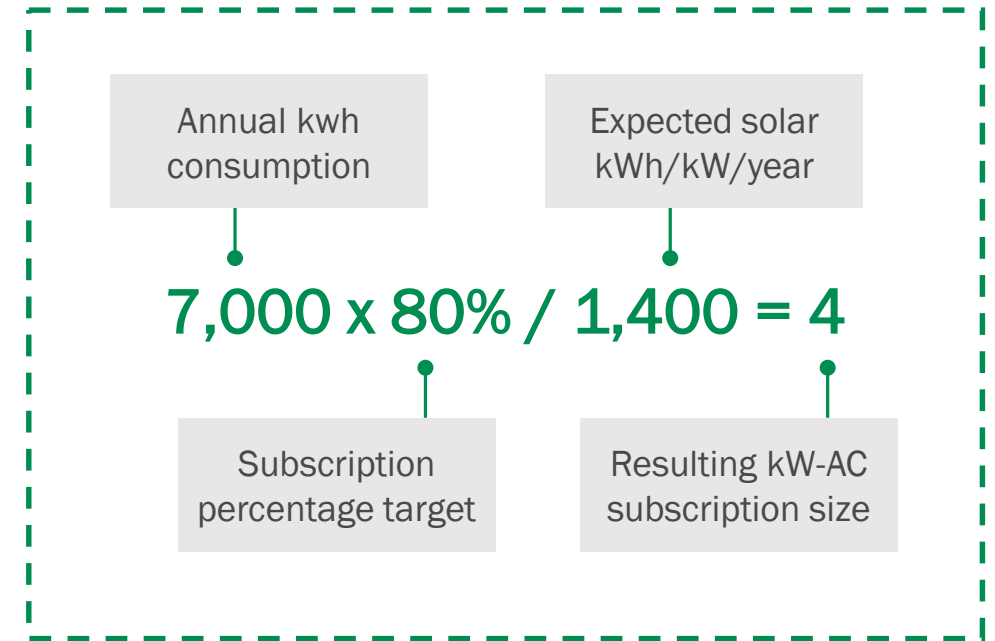
Verification and Documentation

The PA Team will verify that customers are not expected to oversubscribe, and will:

- Request a reduced subscription if exceeding average annual consumption

- Advise of oversubscription risk if exceeding minimum annual consumption

- Perform quarterly checks of oversubscription risk for all participants

PA subscription size verification methods:

- Default: data transfer provided by utilities

- *If requested or necessary:*

  - Average building consumption data

  - Documentation provided by PM

No documentation is required at enrollment, but please keep these on file in case of request:
- Participant contract
- Customer bill
- Customer consumption history / subscription justification

Demo: Adding a Participant

Coming July 2020!

- Contact information
- Project & Subscription size
- Utility Account Data

Participant Recruitment

Project Association: The participant's association to a specific project.

Participant Status: The participant's enrollment status in the program.

LI Verification: Low-income verification performed by the Low-Income Facilitator, CEP.

PA Verification: Verification of the participant's eligibility and subscription sizing.

Credit Billing: The participant's status in the credit billing period.
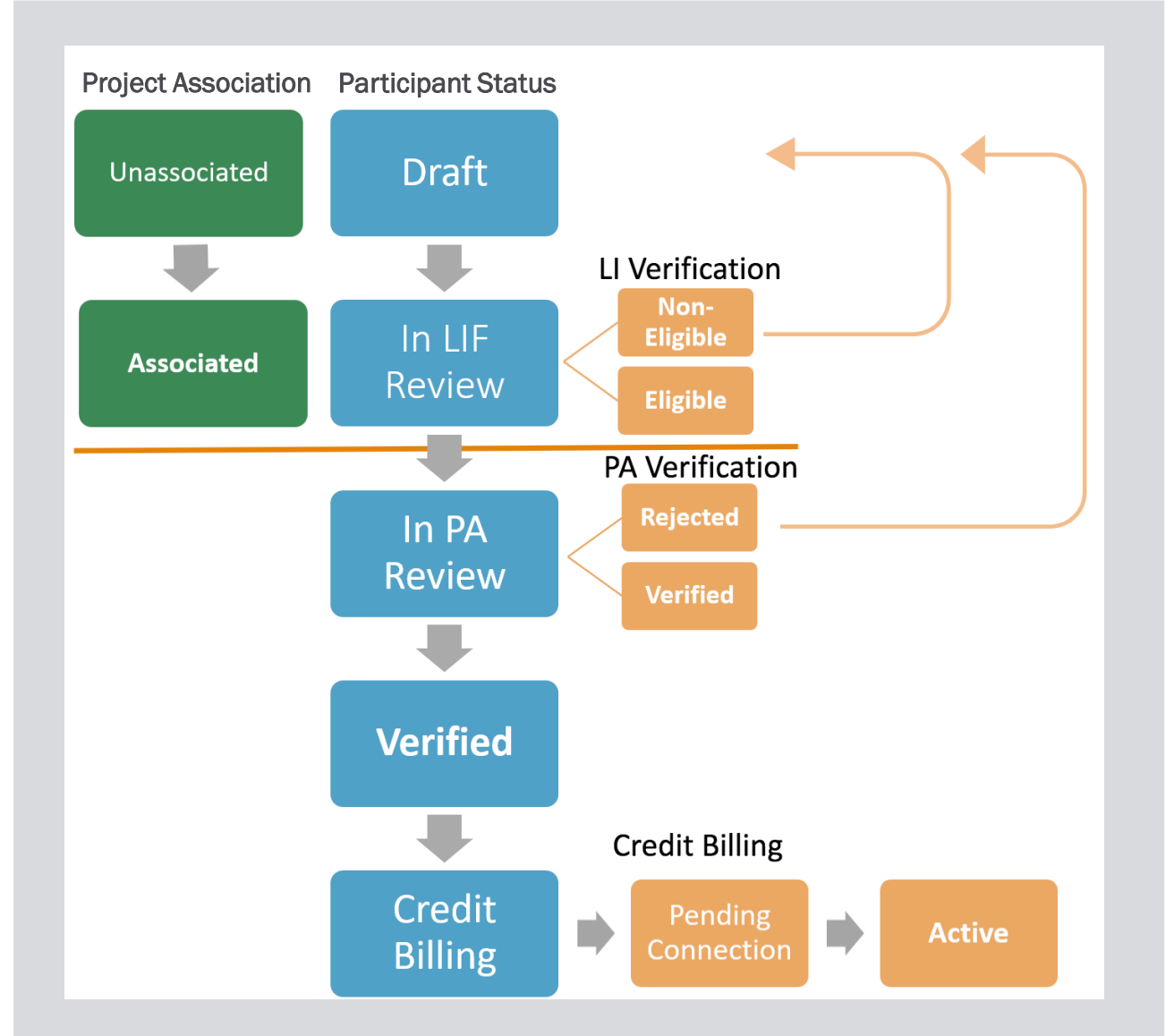
Participant Enrollment

If Project Manager recruits GM/Low-Income:

PM submits information through platform (and contracts with GM subscribers)

↓

PM fills out participant profile, including:
- Utility Information
- Project and Size assignment
- Participant Demographics

↓

CEP confirms low-income eligibility through intake (and the PM contracts with low-income subscriber)

↓

PA verifies and enrolls subscriber in project

If CEP recruits low-income:

CEP fills out participant profile, including:
- Utility Information
- Project and Size assignment
- Participant Demographics

↓

CEP confirms low-income eligibility through intake

↓

PM finalizes contract with subscriber and submits information through platform

↓

PA verifies and enrolls subscriber in project

Subscription Requirements for Certification

1. At least 50% of the Project's capacity is subscribed

2. No more than 50% of capacity is owned or leased by non-residential subscribers

3. Minimum of 10% of capacity is owned or leased by low-income residential

4. Minimum of 5 participants subscribed

5. No participant may own or lease more than 40% of project capacity

Resources

Available Now

- Program Implementation Manual

- Enrollment Guide

Coming Soon

- How-To: Enroll Participants online

- Workshop Recording

Additional Questions:

- administrator@oregoncsp.org

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Program Implementation Manual
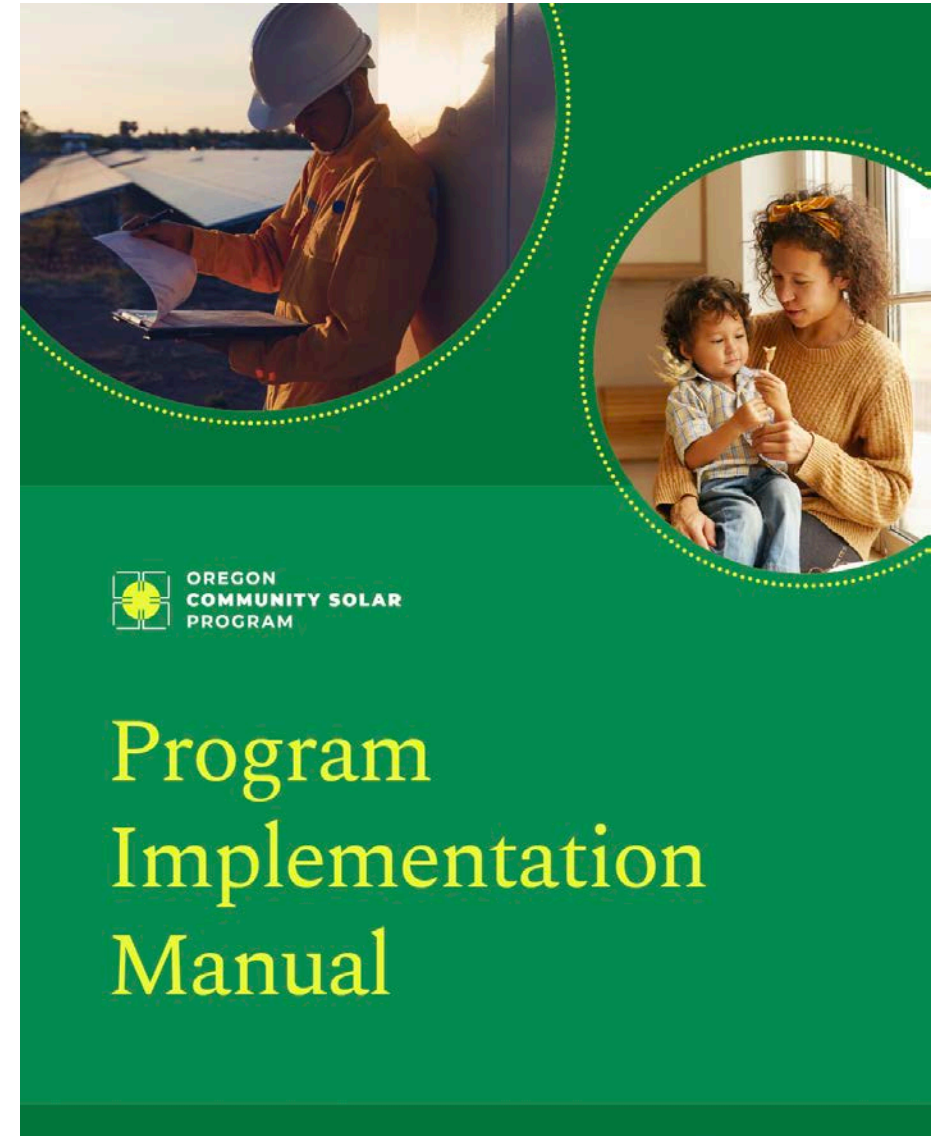
PM Payment Dashboard

Payee information, ACH forms, walkthrough of dashboard, payment timeline

Payee Information and ACH Form

Payee designation at the project level:

- Payee Name
- Email Address
- Mailing Address

Payment options:

- Check
- ACH

Please indicate if you would like to be paid by ACH. If you answer yes, please complete the Vendor and ACH information sections below.

☐ **YES** — Pay by ACH   ☐ **NO** — Do not pay by ACH

VENDOR INFORMATION

Vendor Name: _____

Vendor Address: _____

_____

Email address: _____
(for payment notification)

Name and Title: _____

Signature: _____

ACH INFORMATION

By providing the following bank information to Energy Solutions, the above named vendor is requesting that all payments be deposited to the following account:

Bank Name: _____

Bank ABA #: _____

Bank Account #: _____

Payments Dashboard – Unsubscribed Power Payments

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Home   About ▾   Subscribers ▾   Project Managers ▾   Projects ▾   FAQ   My Account

Account Settings   Company Profile   Project Dashboard   Participant Dashboard   **Payments Ledger**

Payments Ledger

Search by Project Name

Search

Unsubscribed Power	Project Payments	Monthly Participant Records

Record Date	Project ID	Project Name	Total Generation kWh	Unsubscribed Generation kWh	Unsubscribed Power Purchase	Payment Status
05/10/2021	ABC-2020-123	Solar Project LLC - City Park	259,718	25,972	$2,077.76	Paid
04/10/2021	ABC-2020-123	Solar Project LLC - City Park	238,520	59,630	$4,770.40	Paid
03/10/2021	ABC-2020-123	Solar Project LLC - City Park	224,194	67,258	$5,380.64	Paid

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Payments Dashboard – Project Payments

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Payments Ledger

Search by Project Name

| Search |

| Unsubscribed Power | **Project Payments** | Monthly Participant Records |

Record Date ▲	Project ID	Project Name	Subscription Fees Collected	Payment Status
05/25/2021	ABC-2020-123	Solar Project LLC - City Park	$25,712.06	Processing
05/10/2021	ABC-2020-123	Solar Project LLC - City Park	$19,677.90	Paid
04/25/2021	ABC-2020-123	Solar Project LLC - City Park	$17,262.96	Paid

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Payments Dashboard – Monthly Participant Records

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Payments Ledger

Search by Project Name

Search

Unsubscribed Power	Project Payments	Monthly Participant Records

Generation Month	Participant ID	Participant Name	Project ID	Subscription Size kW	Attributed Generation kWh	Subscription Fee Due	Subscription Fee Collected	Payment Status
05/2021	53	Jessica Rodriguez	ABC-2020-123	13.0	95	$10.45	$10.45	Paid
05/2021	55	Megan Davis	ABC-2020-123	5.5	40	$4.40	$0	Late
05/2021	52	Earnest Brown	ABC-2020-123	10.0	73	$8.03	$2.00	Partial

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Subscription Payment Timelines

- Due to the on-bill payment process, PMs will typically receive subscription payments 2-3 months after the end of the monthly generation period.

- **Example:** The subscription fee for the generation produced in May is likely to be paid to the PM in July or August. The subscription fee for generation produced in June is likely to be paid to the PM in August or September, etc.

- The exact timing of subscription payments to the PMs are impacted by the following factors.
    - The Participant's native billing cycle
    - When the participant pays their electricity bill
    - When the utility pays the PA
    - When the PA pays the PM

Subscription Payment Timeline Example

Date	Event
5/31	End of solar generation month
6/9	Utility posts May's generation credits and fees to the Participant's accounts *9th calendar day (or day after if Sunday or Holiday)*
6/12	Customer receives bill with **May** CSP credits/charges at the beginning of cycle
6/27	Customer pays bill 15 days later
7/10	Utility sends Participant Fee Collections file to PA. Participant payment record is now available to PM on the platform. *Twice a month in PGE and PAC, on 10th and 25th calendar days (except for holidays and weekends).*
7/17	Utility remits PM subscription fees to PA
7/23	PA pays subscription fees to PM

Late Payments

PMs will be notified if the full payment is not included in the bi-monthly Collections File in which it is expected. This may or may not coincide with what the utility considers to be a late payment.

- **Example 1:** A Participant's bill is **due on July 16** but the Participant **does not pay until July 18**. Even though the payment is late from the utility's perspective, the payment will be recorded in time for inclusion in the August 10 Collections File. The payment is *not flagged by the PA.*

- **Example 2:** A Participant's bill is **due on July 16** but the Participant **does not pay until August 1**, therefore the payment will be not recorded in time for inclusion in the August 10 Collections File. The payment is *flagged by the PA.*

Participant Status Alerts and Performance Flags

Email alerts, status changes, and miscellaneous notifications

Performance Flags

Email Alert	PM Action		
New low-income recruits on your project	Contact the Participant to finalize contract		
Participant Status changes: • Low-Income Eligible/Ineligible • PA Review Verified/Rejected • Participant Bill Crediting Active • PA Canceled Participant	*If Low-Income*	• Eligible: Proceed contracting • Ineligible: Update draft or choose to cancel	
	If PA Verified	• Verified: Proceed contracting • Rejected: Update draft or choose to cancel	
Utility account changes: • Customer not in good standing • Account Closed • Account Suspended • Account Re-instated • Participant has moved	Contact the Participant to identify new account info • PMs are responsible for proactive account management of participant moves/transfers/cancelations		
Monthly Payment Issued Notifications – Including link to Monthly Ledger	• Confirm payment received • Review Monthly Ledger for participant late or partial payments		

Email communications are sent to the stated "Business Contact Information" email address.
We recommend setting up group email or forwarding rules for all relevant staff members.

Performance Flags

Performance Flags	PM Action
Quarterly oversubscription alerts	Contact Participant to consider sizing down subscription to avoid oversubscription

Considerations for future developments

Future functionality such as access to a platform API

Future Integration Considerations

- **Participant Bulk Upload:**
  A tool to upload a bulk set of participant information

- **Salesforce API:**
  An API to connect with Salesforce instances to push participant information

Q&A/Discussion

Thank You!

Contact:

Oregon Community Solar Program
administrator@oregoncsp.org

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