



OREGON  
COMMUNITY SOLAR  
PROGRAM

# Q1 2021 Project Manager Workshop

Presented by the Program Administration Team

# Program Administration (PA) Team



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## Program Administration

Program Implementation Manual

Funds Management

Public Reporting

## Education & Outreach

Coordination

Workshops and Demos

## Platform Management

CSP Platform Configuration

Utility Integration

Data Security



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## 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



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## Program Administration

Low-income subscriber recruitment

Marketing plan support

Community education

Additional equity goals

## Verification

Household income & size

Waitlist management

Previous energy use

Demographic information



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## Program Administration

Regulatory Policy Development

Budget Management

Contract Management

## Education & Outreach

Commission Workshops administration

Public Stakeholder Engagement

# *Agenda*

- 1 Program Policy Developments
- 2 Language Services
- 3 Website and Resources Overview
- 4 Preparing for Project Certification
- 5 Tracking Project and Participant Progress
- 6 Q&A /Discussion





# *Not Covered Today*

- Tier 2 Developments
- 12-Month CSP Interconnection Report
- Low-income Arrears







# Program Policy Developments

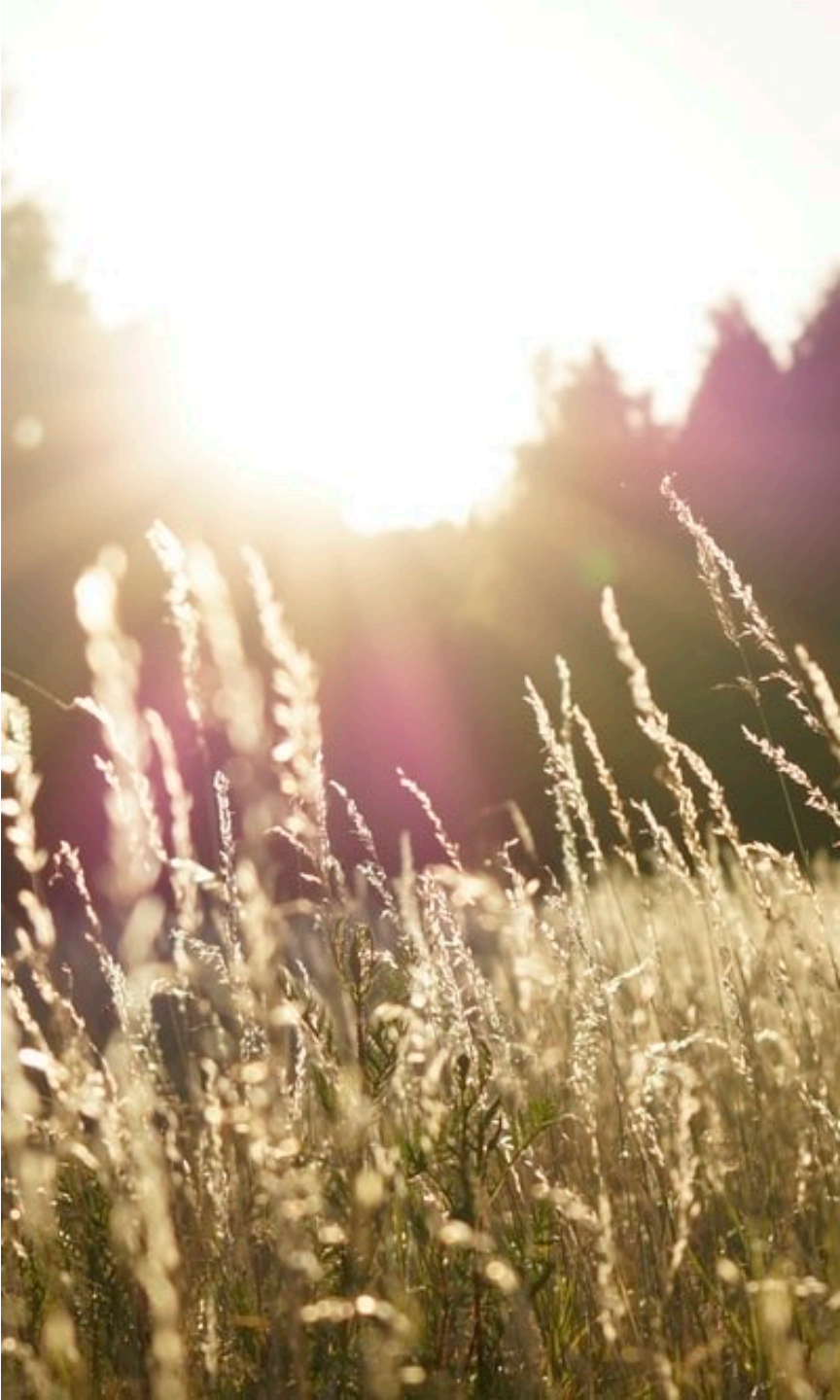
# Bill Credit

The bill credit rate for pre-certified projects in the current tier of capacity will remain at the 2020 levels until January 31, 2022.

*Current levels:*

Portland General Electric	Pacific Power	Idaho Power
\$0.11234	\$0.0977	\$0.0848

The release of new Program capacity is subject to new bill credit rates.



# Low-Income Recruitment Waiver & Penalty

A Project Manager may, by October 21, 2021, apply for project certification *prior to meeting the 10% low-income subscription requirement* without requesting an individual project waiver.

- The Project Manager must reserve the low-income capacity and fully subscribe 10% of a project's capacity with low-income customers **within 12 months of project certification**.
- If any low-income capacity remains unsubscribed at the end of 12 months, revenues from unsubscribed energy generation, based on the as-available avoided cost rate, will be forfeited.



# Alternative Fee Structure

- Project Managers may request to pay for program fees on behalf of participants.
- Project Managers who elect to pay Program Fees will be responsible for paying the **amount of non-low-income capacity subscribed for the Project** on a monthly basis via the utility bill for the CSP project's retail account.
- This option applies to all participants of the project and **may not be changed** after the project is operational.
- Contingent on utility timelines and approval.



# Accessing Participant Consumption Data

- Subscriptions should be sized to prevent **actual kWh production** from exceeding the **actual kWh electricity consumption** of the participant's site over the course of a year.
- The PA team can assist in sizing commercial customers prior to signing a contract.
- The PA will also provide quarterly checks of participant consumption and attributed generation data and reach out to the PM to alert them of risks of oversubscription, However the PM is solely responsible for managing the participant's subscription.



Suggested sizing by the PA team is provided, but not required. PMs and the customer are ultimately responsible for selecting a subscription size.

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# Accessing Participant Consumption Data

- To allow the Project Manager to better manage subscription sizing and prevent annual oversubscription, monthly participant consumption data will be available in the program platform.
- On a monthly basis, the PA will collect and report on attributed generation (kWh) and consumption (kWh) for each participant for the previous month.

Payments Ledger

Unsubscribed Power

Project Payments

Monthly Participant Records

Billing Errors

SEARCH

0 to 0 of 0

Generation Month	Participant ID	Participant Name	Project ID	Subscription Size (kW)	Attributed Generation (kWh)	Participant Consumption (kWh)	Subscription Fee Due	Subscription Fees Collected	Payment status
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# Accessing Participant Consumption Data

Project Managers will be provided with access to participant consumption data contingent on the following:

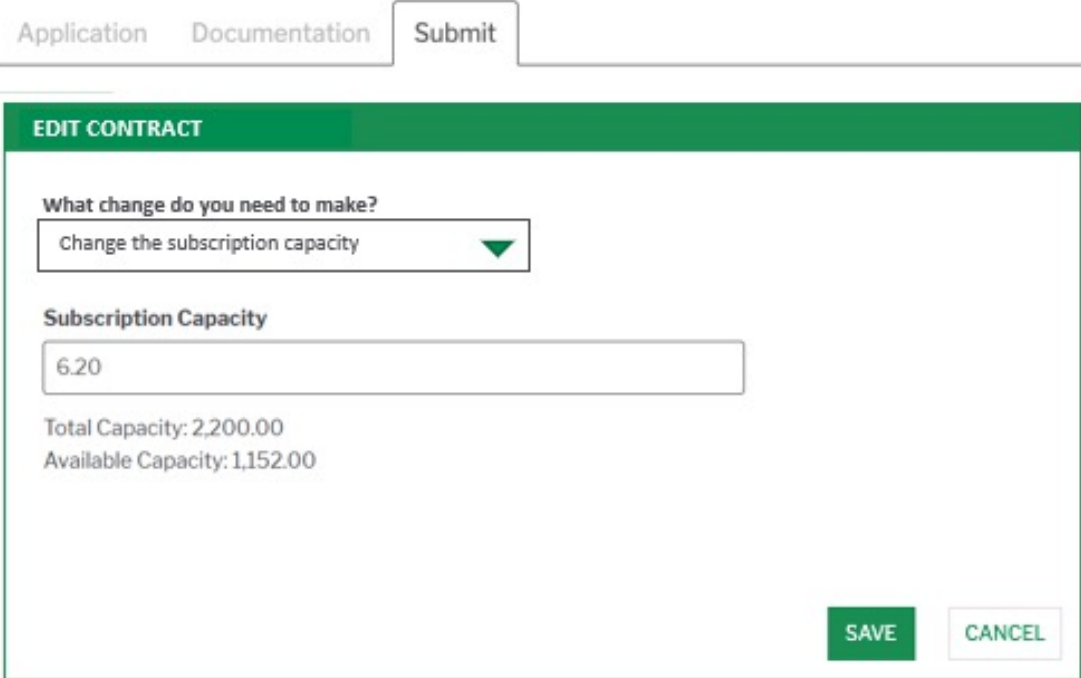
- ☐ Attesting that you have fully executed each Participant's agreement in the program platform
- ☐ Abiding by the Code of Conduct regarding protection and security of customer information (required upon PM registration)
- ☐ Executing a separate NDA with Energy Solutions (*applicable to PGE projects only*)



# Accessing Participant Consumption Data

Project Managers are allowed (and encouraged) to modify the subscription size of Participants at any time. This must also be specified within the Participant's contract.

**After a project becomes operational, please reach out to the PA to facilitate an adjustment to a Participant's subscription size.**



The screenshot shows a web interface with a top navigation bar containing 'Application', 'Documentation', and 'Submit' tabs. Below this is a modal window titled 'EDIT CONTRACT' with a green header. Inside the modal, there is a dropdown menu labeled 'What change do you need to make?' with the selected option 'Change the subscription capacity'. Below the dropdown is a text input field labeled 'Subscription Capacity' containing the value '6.20'. Underneath the input field, the text 'Total Capacity: 2,200.00' and 'Available Capacity: 1,152.00' is displayed. At the bottom right of the modal are two buttons: a green 'SAVE' button and a white 'CANCEL' button with a green border.

*PMs will soon be able to adjust subscription sizing via the program platform at any time to be applied for the next billing month.*

# Upcoming Project Incentives

Incentives for qualifying projects will be available soon through Energy Trust of Oregon.

## Eligibility Criteria:

- Smaller than 360 kW-AC; and
- Either:
  - 50% of project reserved for low-income **or**
  - Project proponent is non-profit with stated mission/track record of benefitting underserved communities

Expected to be **available in April.**

**Custom incentives** available based on project need.





# Language Services





# Language Services and Recruitment

- If you offer multilingual services for participants, inform the Program Administrator to receive more multilingual leads

*CEP is happy to recommend services to enable live phone calls in other languages.*

- Be sure to notify the Low-Income Facilitator as soon as you begin recruitment, or you will not be assigned LI subscribers.

# Multilingual Materials

Currently the PA Team has documents available in English, Spanish, Vietnamese, and Russian.

- **Contracts:** PMs to provide, filled out, in the language of the customer's choice
- **Outreach materials:** Brochures, and flyers in various language combinations and styles
- **Educational materials:** In-depth explanations of complicated issues



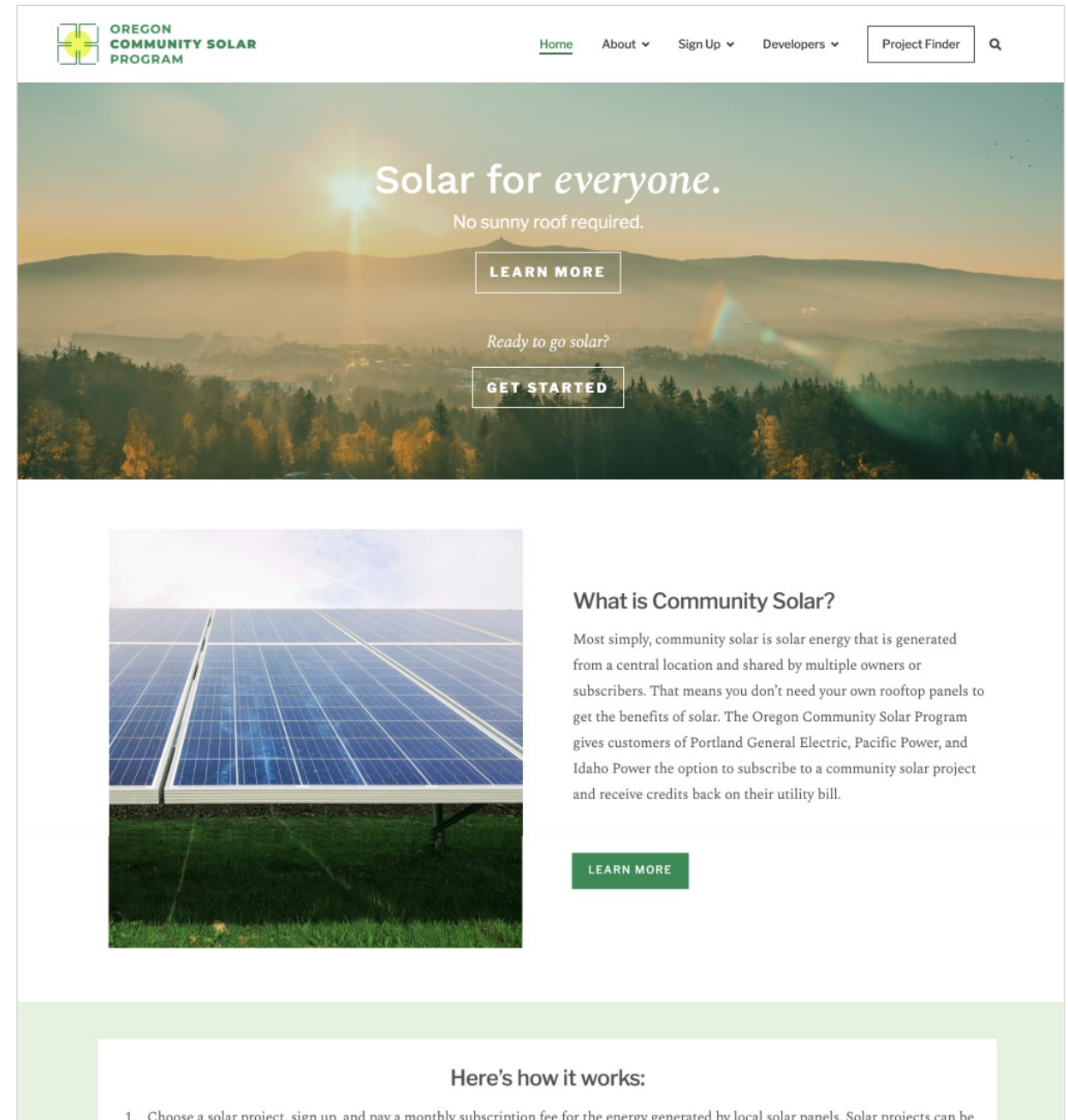




# Website and Resources Walkthrough

# New Website Redesign

- The program website, [www.oregoncsp.org](http://www.oregoncsp.org), has been redesigned!
- Central hub for payments and participant management: [www.portal.oregoncsp.org](http://www.portal.oregoncsp.org)
- What's New?
  - Participant-centric design
  - Interactive Subscription Size Calculator
  - Interconnection Page for PMs
  - URLs & links
- [Take a Tour](#)







# Assigning Participants and Preparing for Certification



# Signing Up LI Participants

## Shared Recruitment

- Sharing real-time data through google docs
  - Let's do a walkthrough! (see link in chat)
- CEP will, for the time being, upload LI subscribers to the platform for the PM

## LIF recruitment

- CEP will move participants, already sized, to your project.

[https://docs.google.com/spreadsheets/d/186gjBMjLpedWG2V2x-LBGXz\\_5Poynt8MzbZ1Nspulk/edit?usp=sharing](https://docs.google.com/spreadsheets/d/186gjBMjLpedWG2V2x-LBGXz_5Poynt8MzbZ1Nspulk/edit?usp=sharing)



# Signing Up LI Participants

- Once CEP has assigned a Participant to your project, the Participant will appear on your Participant Dashboard.
- You may also download the Participant Export and filter for Participants in “Contract Status = Draft” “Low-Income Review = Eligible” and “Consent Form Received = TRUE”

Participant Dashboard

NEW PARTICIPANT

Search by Name, Address, or Participant Status

Search

PARTICIPANT EXPORT

Participant ID	First Name	Last Name	Participant Status	Contract ID Project ID	Contract Status	Low-Income Eligible?	Consent Form Received?
348	Rebecca Test Participant		Pending Connection	Contract: 349 PGE-2020-1	Draft	✓	✓

ADD NEW SITE ADDRESS

CREATE NEW CONTRACT

# Signing Up LI Participants

The Project Manager may now work with the Participant to sign the Participant Agreement. Once the Project Managers attests that the customer has signed the contract, the Project Manager can submit the Participant for PA Review.

## Participant Enrollment Form

ContractID - 349

Status: Draft


Low-Income Verification: Eligible

Participant Status: Pending Connection

Application

Documentation

Submit

- 
- ☐ I attest that this customer has signed a contract agreeing to the subscription size and pricing product indicated above, and that this contract includes an energy information releases which gives their utility permission to share customer account and consumption data with the Project Manager and Program Administrator.

SUBMIT FOR PA REVIEW

← BACK



# Signing Up General Market Participants

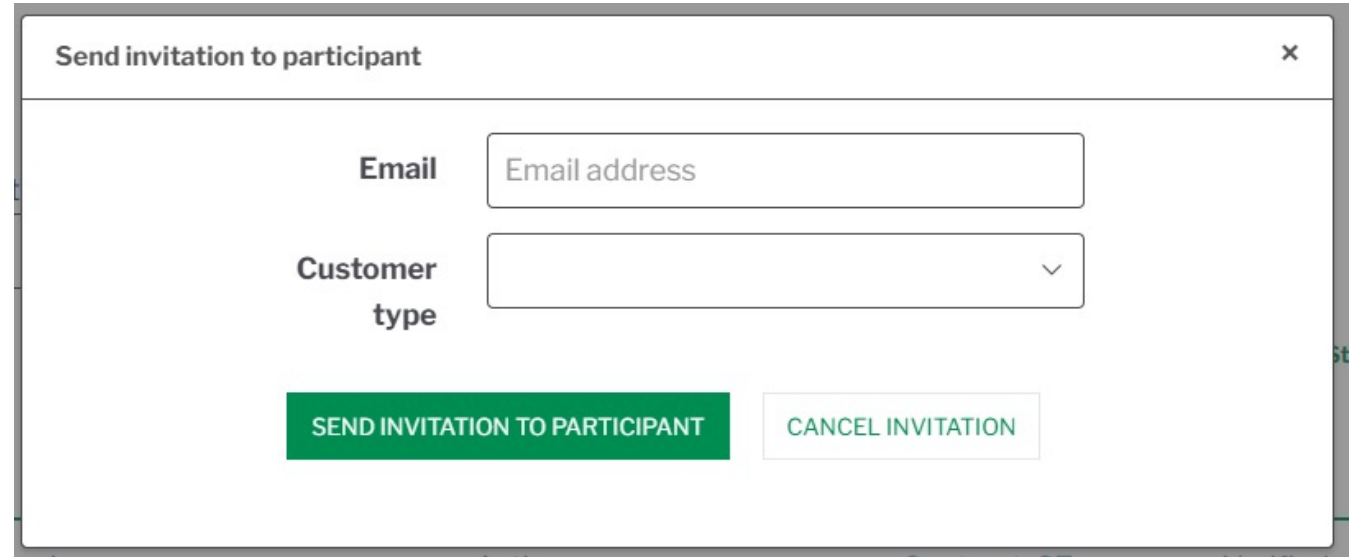
- Review 'Participant Enrollment Guidance' resource
- Complete required customer information, including utility identifiers
- Demographic Survey
- Documentation
- Subscription Sizing Information



# Send Invitation to Participant

When creating a new Participant, Project Managers have the option of generating the form on behalf of participants or sending the invitation to participants to fill out themselves.

- All fields are optional for the Participant
- After Participant selects “Done,” the Participant is available in Draft status on the Participant Dashboard and an email is sent to the Project Manager.



The screenshot shows a modal dialog box titled "Send invitation to participant" with a close button (X) in the top right corner. Inside the dialog, there are two input fields: "Email" with a placeholder "Email address" and "Customer type" with a dropdown arrow. Below these fields are two buttons: "SEND INVITATION TO PARTICIPANT" in a solid green box and "CANCEL INVITATION" in a white box with a green border.

# How to Submit for Certification

- Review 'Expectations for Project Certification' resource
- Upload all documents to the project application portal in the CSP platform
- Upload participants as soon as you are able
- Complete all required fields
- Anticipate at least one month from the request date to certification by the OPUC

Operation can begin once the project is certified and after the commercial operation date.

*(Requested in the platform by the Project Manager)*





# Working with the Utility

- Each utility has specific contacts for different inquiries—please see the Utility Contacts guide.
- Utility representatives to contact when requesting utility account number information:

## **Portland General Electric (PGE):**

Email  
service.coordinators@pgn.com

## **Pacific Power (PAC):**

Call 1-888-221-7070 once  
the solar site has been  
established during the  
interconnection process

## **Idaho Power (IPC):**

Call 1-800-632-6605  
after the meter has  
been installed

- Self-identify as a Community Solar Program project manager in all communications.

A woman with curly hair is smiling while talking on a black telephone. She is sitting at a desk in an office. On the desk, there is a computer monitor, a keyboard, a mouse, a glass of water, and some papers. A window in the background shows a city skyline. A white rectangular box is overlaid on the image, containing the text "Managing Payments" in green.

# Managing Payments



# January

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	<b>1</b> Participant Subscription Status File Project Operational File	<b>2</b> Project Generation File Participant Consumption File	<b>3</b>	<b>4</b>	<b>5</b> Participant Billing File Unsubscribed Project Generation File	<b>6</b>
<b>7</b>	<b>8</b> Participant Subscription Status Confirmation File	<b>9</b>	<b>10</b> Actual Participant Fee Collections File	<b>11</b>	<b>12</b>	<b>13</b>
<b>14</b>	<b>15</b> Participant Subscription Status File Project Operational File	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b> Unsubscribed Purchase Cost File	<b>20</b>
<b>21</b>	<b>22</b> Participant Subscription Status Confirmation File	<b>23</b>	<b>24</b>	<b>25</b> Actual Participant Fee Collections File	<b>26</b>	<b>27</b>
<b>28</b>	<b>29</b>	<b>30</b>				

## Utility Data Exchange Calendar Example

Data from PA to Utilities

Data from Utilities to Platform



# How to Track Project Payment and Participant Information

## Payments Ledger

<div>Unsubscribed PowerProject PaymentsMonthly Participant RecordsBilling Errors</div>						
<div>SEARCH</div>						
File date	Project ID	Project Name	<div>Project Generation File</div> Total Generation (kWh)	<div>Unsubscribed Project Generation File</div> Unsubscribed Generation (kWh)	<div>Unsubscribed Purchase Cost File</div> Unsubscribed Power Purchase	Payment Status
03/02/2021	AB-2020-11	Sunny Farms	110,345.89	28,689.93	\$516.75	Processing
<div>↑</div> <div>Date information received from Platform</div>			<div>↑</div> <div>New file posted 2<sup>nd</sup> business day of the month</div>	<div>↑</div> <div>New file posted 3 days later</div>	<div>↑</div> <div>New file posted 10 business days after receiving unsubscribed generation</div>	<div>↑</div> <div>Updated by Energy Solutions after payment is issued</div>

# How to Track Project Payment and Participant Information

## Payments Ledger

Unsubscribed Power

## Project Payments



Monthly Participant Records

## Billing Errors

SEARCH

Actual Participant  
Fee Collections  
File

0 to 0 of 0

File date	Project ID	Project Name	Subscription Fees Collected	Payment Status
03/10/2021	AB-2020-11	Sunny Farms	\$8,282.38	Paid
				
Date Information is Received from Platform			Updated 10 <sup>th</sup> and 25 <sup>th</sup> of each month or next business day*	Updated by Energy Solutions after payment is issued

# How to Track Project Payment and Participant Information

## Payments Ledger

Unsubscribed Power

Project Payments

Monthly Participant Records

Billing Errors

SEARCH

Participant Billing File

Participant Billing File

Actual Participant Fee Collections File

0 to 0 of 0

Generation Month	Participant ID	Participant Name	Project ID	Subscription Size (kW)	Attributed Generation (kWh)	Subscription Fee Due	Subscription Fees Collected	Payment status
03/2021	135	Jane Doe	AB-2020-11	5 kW	220.51 kWh	\$22.37	\$22.37	Paid
				<div>↑</div> <div>Current Subscription Size in Platform on 5<sup>th</sup> business day</div>	<div>↑</div> <div>Updated on 5<sup>th</sup> business day of each month</div>	<div>↑</div>	<div>↑</div> <div>Updated 10<sup>th</sup> and 25<sup>th</sup> of each month or next business day*</div>	<div>↑</div>



# How to Track Project Payment and Participant Information

## Payments Ledger

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Participant Subscription Status Confirmation File

0 to 0 of 0

Date	Participant ID	Participant Name	Project ID	Error code	Error reason	Resolved
03/2021	135	Jane Doe	AB-2020-11	2	Account Number not found	No
<div>↑ Date Information is Received from Platform</div>				<div>↑ Updated 5 business days after receiving Subscription Status File on 1<sup>st</sup> and 15<sup>th</sup> of the month</div>	<div>↑</div>	<div>↑ Manually selected by PM (Y/N)</div>



# Q&A/Discussion





# *Thank You!*



**OREGON  
COMMUNITY SOLAR  
PROGRAM**

**Contact:**

**Oregon Community Solar Program**

[administrator@oregoncsp.org](mailto:administrator@oregoncsp.org)