OREGON
COMMUNITY SOLAR
PROGRAM

Participant Enrollment Guidance

This document provides guidance on the participant enrollment process to Project Managers in the Oregon Community Solar Program. Project Managers should review this guidance in tandem with the participant and subscription sizing requirements contained the Oregon Community Solar Program Implementation Manual, available at www.oregoncsp.org/pim.

The first section of this resource provides guidance on what information Project Managers will need to enroll a Participant, and where they can find this information. The second section describes how Project Managers may size Participant subscriptions to avoid oversubscription.

Key Takeaways

1. Project Managers must collect and provide Participant information to the Oregon Community Solar Program to enroll a customer. Participant information may be uploaded either through the Program website at www.oregoncsp.org, or through an API that connects to Salesforce.

2. For most customers, Project Managers should obtain both a **recent utility bill** and a **download of historic electricity consumption** from a Participant to collect the data needed for sizing and enrollment. Both of these are available to the customer via their utility's online portal.

3. **Sizing customer subscriptions correctly is a critical activity**, and will be verified by the Program Administrator.

Enrolling Customers in the Program

Project Managers must provide the Oregon Community Solar Program with certain information about the customers they wish to enroll in their projects. The Project Manager should collect the required information from Participants during the contracting process, and should provide that information to the Program after contracting is complete. Only customers that have signed a Community Solar Participant Contact (including an Energy Information Release) may be enrolled in the Program, and Project Managers must attest that each Participant has signed the contract and information release.

A Project Manager may provide Participant information in one of two ways:

- Via a webform available at www.oregoncsp.org.
- Through API integration with Salesforce.

Additional guidance on using the Oregon CSP platform to enroll customers is provided in the Project Manager Resources page of the Oregon CSP website at www.oregoncsp.org/pm-resources.

Required Customer Information

The following Participant information is required at the time of enrollment:

- **Participant Name** – Name of customer that signed Community Solar Participant Contract
- **Primary account holder, as it appears on the utility bill** – Used by Program Administrator and Utility for verification purposes, this could be either an individual or business name and may differ from Participant name for joint or commercial accounts
- **Phone Number** – Participant's preferred phone number
- **Email** – Participant's preferred email address
- **Customer Type (Residential, Low-Income, Small Commercial, or Large Commercial)** – See section below on Customer Types
- **Site Address** – The physical address that is being enrolled in the Program. See section below on Utility Identifiers for instructions regarding Participants with multiple sites
- **Site City** – The city of the physical address that is being enrolled in the Program
- **Site Zip Code** – The zip code of the physical address that is being enrolled in the Program
- **Electric Utility** – The utility serving the Site Address
- **Utility Account Number** – See section below on Utility Identifiers
- **Utility Meter Number** – See section below on Utility Identifiers
- **Utility Service Agreement Number** – See section below on Utility Identifiers
- **Community Solar Project ID** – The Project Manager should enter the ID of the Project that the Participant will be subscribed to
- **Community Solar Subscription Product** – The Project Manager may select one of the pricing products that have been submitted for that project. Any desired changes to pricing products should be made via the Project interface.
- **Community Solar Subscription Size (kW-AC)** – See discussion section below on Subscription Sizing
- **Method of Verifying Subscription Size** – See section below on Program Administrator Subscription Verification
- **Demographic/Firmographic Information** – See section below on Participant Surveys

Utility Identifiers

A Participant in the Oregon Community Solar Program is defined at the site level, which comprises all meters controlled by the same utility account that are located at the same site. Depending on the customer, either two or three utility identifiers will be required to enter the Participant in the program:

1. **Utility Account Number**. This is the primary identifier used to associate a community solar subscription with a utility account.
2. **Meter Number**. This is used by the Program Administrator and Utility to verify that Program charges and credits are associated with the correct utility customer and site. If a site has multiple meters, only one meter number is required.
3. **Service Agreement Number**. The Service Agreement Number is required to confirm which site is being enrolled in the program. This identifier is a required field for all Pacific Power and Idaho Power Participants. For PGE Participants, this must only be provided (and is only listed on the customer bill) if the Participant's utility account is associated with more than one site.

The easiest way for a Project Manager to obtain these utility identifiers is to request a copy of the customer's utility bill, available via their utility's online portal. The Appendix of this guidance document indicates where the required information may be found on each utility's bill.

If a utility account holder controls meters at multiple physical sites, or that are associated with multiple Service Agreement numbers, and wishes to enroll these in the Program, each physical site and Service Agreement Number should be entered as a separate Participant.

Note: The Subscription Sizing section below includes instructions for downloading past customer electricity consumption in spreadsheet format. While these spreadsheets do list customer account numbers, these may not be the same account numbers that are listed publicly on a customer's bill and should not be used as the source for customer account information in the Oregon CSP platform. Project Managers should use the customer's utility bill, not the customer's usage history CSV file, as the source for utility identifiers.

Customer Types

Oregon Community Solar Program Participants are classified as either Residential, Low-Income, Small Commercial, or Large Commercial/Industrial/Irrigation customers. With the exception of Low-Income customers (who are defined based on income guidelines and verified by the Program's Low-Income Facilitator), a Participant's utility rate schedule determines which category they fall into. A table of rates schedules and customer categories is provided in the *Eligible Rates & Customer Types* document available in the Project Manager Resources section of the Program website at www.oregoncsp.org/pm-resources.

Project Managers are asked to enter the customer type of Participants as they are enrolled. The Program Administrator will verify and update these classifications on the platform as part of its review. Project Managers must track their Participants' customer class to ensure that their project is in compliance with the Program requirements that (1) at least ten percent of Project capacity be allocated to verified low-income Participants, and (2) that large non-residential customers not allocated more than 50% of Project capacity.

Demographic Survey

Project Managers will be asked to collect basic demographic or firmographic information from Participants at the time of enrollment, and to enter this information the CSP participant profile when enrolling a customer. Participants may decline to provide this information and the Project Manager may forgo the survey if a Participant refuses to answer one or all questions. However, collecting this information is critical to learning about customers served by the Program, and Project Managers are expected to collect it for most customers.

Documentation

In certain circumstances, a Project Manager may be required to upload either a copy of a Community Solar Participant Contract or documentation of a Participant's energy consumption.

Customer Contracts

Generally, the Program does not require that Project Managers upload customer contracts, though the Project Manager must attest that the Participant has signed a customer contract agreeing to the specified pricing product and subscription size, and that the contract includes the required Energy Information Release. In the course of addressing customer complaints, Project Managers may be asked to provide a copy of a Participant's contract, and any misrepresentation of customer agreements will be subject to Program disciplinary procedures.

Consumption Documentation

The Program Administrator will verify customer subscription sizes using past consumption data through the process described in the Subscription section below. For most customers, the Project Manager does not need to upload documentation of a Participant's consumption history. For certain customers, such as those with no billing history, the Project Manager must either upload separate documentation of billing history or energy modelling results, or be asked to provide additional information on building typology for use in verifying customer subscription sizing.

Subscription Sizing Information

- **All Oregon Community Solar Program subscriptions are sized in kW-AC**, which refers to the portion of a community solar project that the participant subscribes to. For example, if a participant subscribes to 5 kW-AC of a 100 kW-AC project, then five percent of the project's total monthly generation (in kWh) would be allocated to the participant every month and the value of the associated bill credit would appear on their utility bill. While all participant subscriptions are sized in kW, project managers may choose to charge their participants on a $/kW-month basis, a $/kWh basis, or an alternative format that is contingent on approval from the Program Administrator.
- **Participants may not subscribe to a portion of project capacity that is expected to generate more energy than they consume annually**. If a subscription generates excess generation, the bill credits associated with the excess generation must be repaid by the participant at the end of the annual true-up period. For example, if a customer consumes 10,000 kWh in a year, but subscribes to a community solar subscription that produces 12,000 kWh in that year, the customer must repay the bill credits received for the excess 2,000 kWh that their subscription produces. Additional information on how excess bill credits are treated is included in the Program Implementation Manual.
- **The Program Administrator will assess subscription levels as part of the Participant verification process**. Participant subscriptions that are expected to exceed a customer's historic average consumption will be flagged, and the Project Manager will be asked to reduce a customer's subscription size to avoid oversubscription. This verification process is discussed in more detail below.
- **Project Managers are encouraged to size subscriptions conservatively.** While a Participant is permitted under Program rules subscribe to a share of a community solar project that is expected to generate up to 100% of their average annual consumption, a customer's actual annual generation

and consumption will vary from year to year. A Participant may have below-average consumption in a mild-weather year, for example, and a result may oversubscribe in that year. To provide a positive customer experience and ensure that Participant can receive the full benefit of their subscription, the Program Administrator recommends that subscriptions not exceed 80% of a Participant's expected annual consumption.

Sizing Customer Subscriptions

A suitable kW-AC subscription size for a Participant is a function of three inputs:

- **A Participant's annual electricity consumption in kWh**, multiplied by:
- **The share of annual consumption desired to be offset by community solar** (which may not exceed 100% and which is not recommended to exceed 80%), divided by:
- **The community solar project's expected annual kWh production per kW-AC**.

A *Subscription Sizing Calculator* is available on the Project Manager Resources page of on the program website at www.oregoncsp.org/pm-resources.

Sizing Low-Income Subscriptions

Depending on the Project, low-income Participants may be recruited by either the Project Manager or by the Low-Income Facilitator. The Program Administrator will recommend subscription sizes for the low-income Participants recruited by the Low-Income Facilitator before these customers are allocated to specific Projects.

Obtaining Past Participant Consumption Data

Obtaining historical customer consumption data is the best resource for sizing a subscription. Project Managers should ask the customer to provide a CSV download of their usage history from their utility website (annual consumption cannot be obtained by viewing a single monthly utility bill). Instructions for accessing this information through each participating utility's customer portal is shown below. If several years of usage history are provided by the customer, it is recommended that the Project Manager use the average of these years or (to be conservative) use the lowest-consumption year.

Instructions for Downloading Customer Usage History

Portland General Electric: A PGE customer may access and share their past energy consumption data by:

- Logging in to their customer account at www.portlandgeneral.com.
- Clicking on "My Usage" (located in the yellow-shaded box labeled "Energy Tracker" in the lower right-hand box of the account interface).
- Clicking the "Green Button Download My Data" button that appears below the chart display on the right side of the screen, and then clicking "Export" *(without changing the default export settings provided).*
- The resulting CSV file will provide a customer's past monthly energy consumption, and can be provided to a project manager to develop an annual consumption estimate. Note the Service Agreement number listed on the CSV export is separate from the SPID listed on the customer's bill. The Service Agreement number is not required information for the program.

Instructions for Downloading Customer Usage History, *continued*

Pacific Power: A PAC customer may access and share their past energy consumption data by:

- Logging in to their customer account at www.pacificpower.net.
- Clicking on "Energy Usage" in the left-hand My Account menu bar.
- Above the chart displayed on the screen, clicking the drop-down menu labeled "For the period of:" and selecting "two years" (or the greatest time period available).
- Below the chart, clicking "Download Usage History" (be careful not to click "Download Green Button Data" instead, as this will download the data as an XML file instead of the desired CSV file).
- The resulting CSV file will provide a customer's past monthly energy consumption, and can be provided to a project manager to develop an annual consumption estimate.

Idaho Power: An IPC customer may access and share their past energy consumption data by:

- Logging in to their customer account at www.idahopower.com.
- Clicking on "View Monthly Usage" (located in the boxes at the top of the screen on the main page of My Account).
- Switching the view from "Display Graph" to "Display Table".
- Click the "Download" link that appears at the top right side of the table.
- The resulting CSV file will provide a customer's past monthly energy consumption, and can be provided to a project manager to develop an annual consumption estimate.

If Participant billing history cannot be obtained (such as in the case of a new building or a new customer account), Project Managers may use statewide average consumption values to stand in for a customer's annual consumption. To assist with this, an Average Home Energy Consumption Workbook is provided on the Project Manager Resources page of on the program website at www.oregoncsp.org/pm-resources. Estimating annual consumption with this approach will require some additional information about the site, such as such as square footage, building type and the use of electric heat. **It is recommended that Project Managers be particularly conservative in sizing subscriptions when using this method**, as a participant may have below-average energy consumption for their building type.

Program Administrator Subscription Sizing Verification

The Oregon Community Solar Program Administrator will verify the eligibility of every community solar participant using consumption information history provided by the participant's utility. As part of the verification, the Program Administrator will compare the expected generation of a Participant's subscription to past consumption. This consumption data is not available to the Program Administrator until a Participant has signed a Community Solar Participant Contract, which includes a release for the energy data.

Pending available data (which may include consumption from prior utility customers at the same site), the Program Administrator will look at up to five years of usage history. Based on this review:

- If a Participant's expected community solar generation exceeds ***average*** annual consumption during that time period, the Program Administrator will contact the Program Manager and ask that they reduce the Participant's subscription size to below that level.
- If the Participant's expected generation exceeds the ***minimum*** annual consumption during that time period, the Program Administrator will inform the Project Manager that the Participant is at risk of oversubscription in a low-consumption year, but will not require a subscription size reduction.

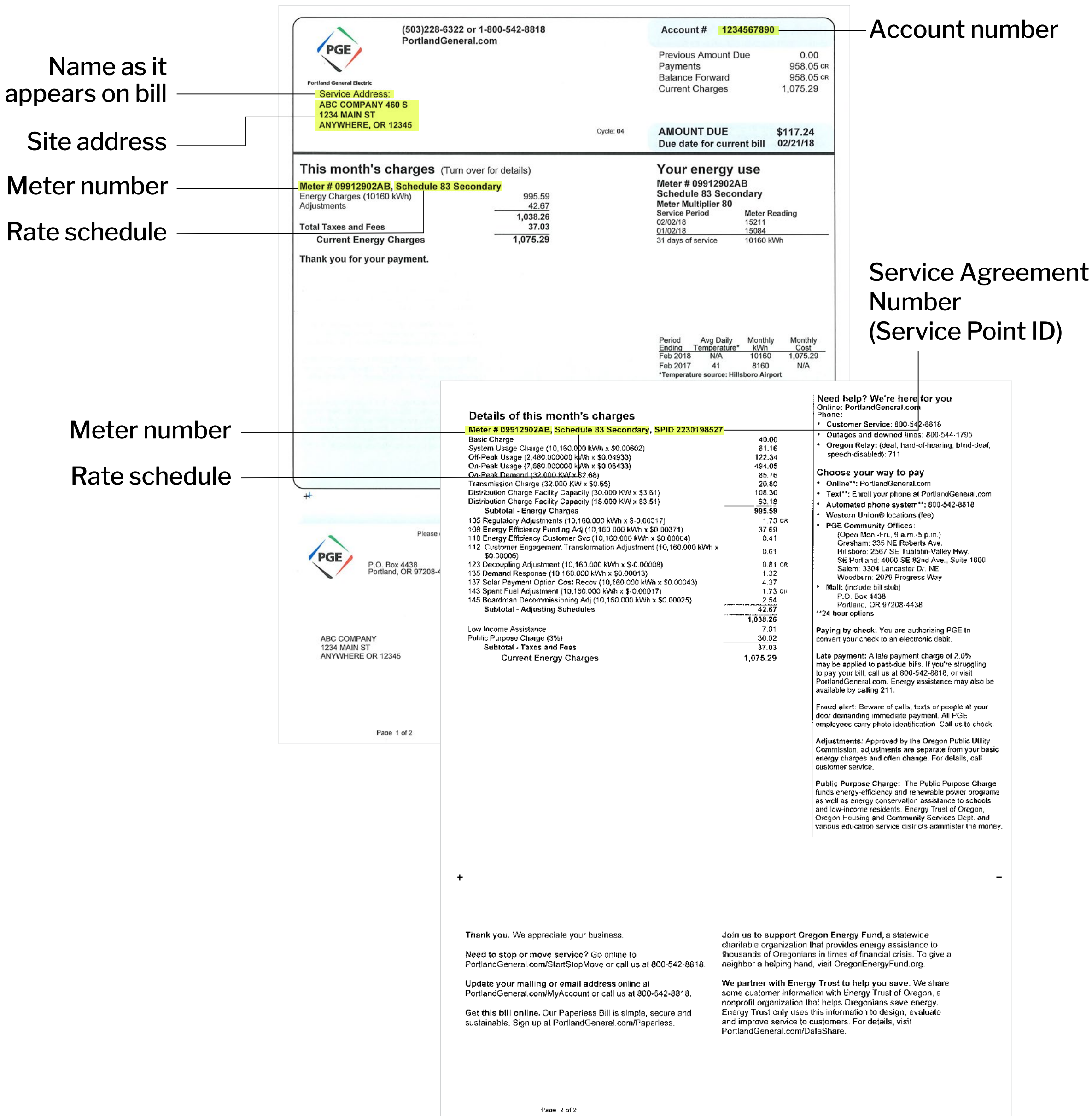
If there is no record of past consumption at the customer site, the Program Administrator will use average customer consumption data to perform this verification using customer site information provided by the Project Manager.

To mitigate the risk of a Participant oversubscribing to a community solar project and not receiving the full value of their subscription, **the Program Administrator will perform quarterly checks** of subscription generation against consumption for all active Participants. If a Participant is identified as being at risk of over-subscription for the year, the Program Administrator will inform both the Project Manager and the Participant (if a Participant email address has been provided) and recommend that they re-size the subscription. While the Program Administrator offers these regular checks as a service to mitigate the risk of over-subscription, subscription sizing is ultimately the responsibility of Project Managers and Participants, and the Program makes no guarantee that this process will catch or guard against all cases of potential over-subscription.

Appendix: Sample Utility Bills

The below images display where a Project Manager can locate the required customer information on each utility's bill.

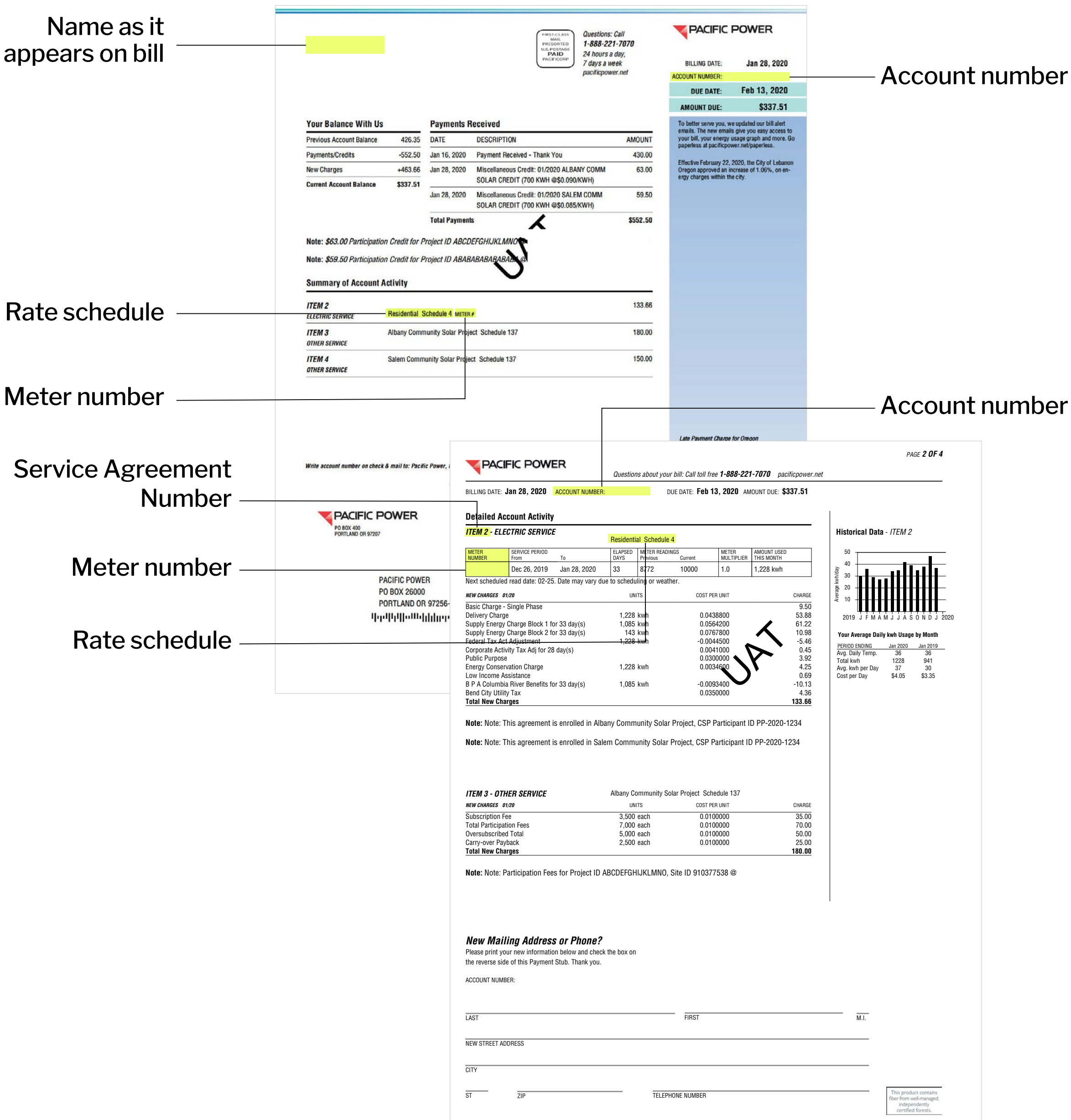
Portland General Electric



Data Validation Notes:

- **Format:** Utility Account Number, Utility Meter Number, and Service Agreement Number are all 10-character entries (including any leading zeroes) with no spaces or special characters.
- **Service Agreement Number** is labeled as "SPID" on the PGE bill.

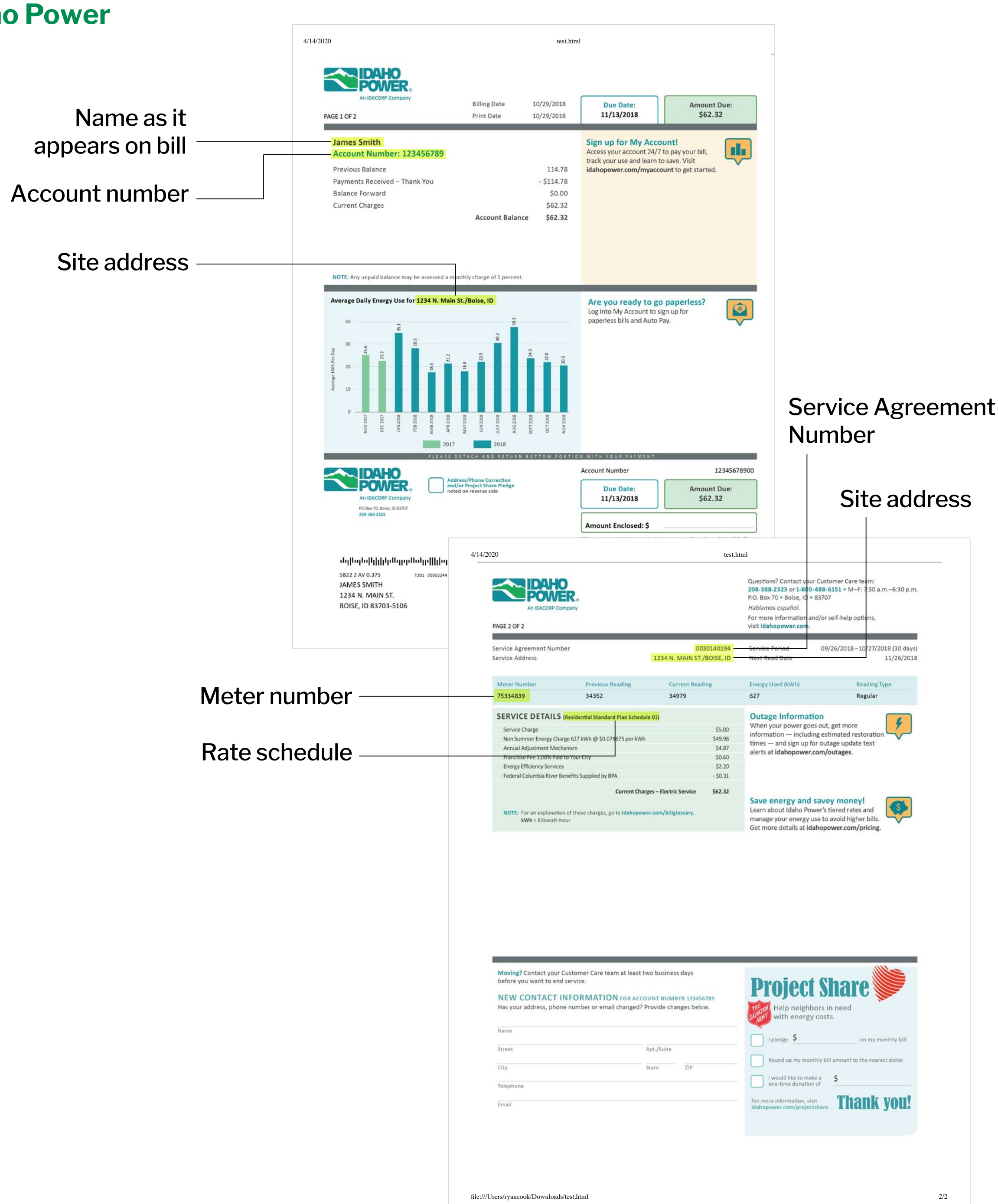
Pacific Power



Data Validation Notes:

- **Utility Account Number Format**. A 14-character entry including a hyphen and a space, formatted as: "1234568-001 1"
- **Utility Meter Number Format**: A 8-character entry (including any leading zeroes) with no spaces or special characters.
- **Service Agreement Number Format**: Listed as "Item" number on the bill, formatted as a 3-character entry with leading zeros. For example, if you wished to enroll the site listed on the bill as "Item 1", you would enter "001".

Idaho Power



Data Validation Notes:

- **Utility Account Number Format.** A 10-character entry (including any leading zeroes), all numeric.
- **Utility Meter Number Format:** A 8-character entry (including any leading zeroes), all numeric.
- **Service Agreement Number Format:** A 10-character entry (including any leading zeroes), all numeric.