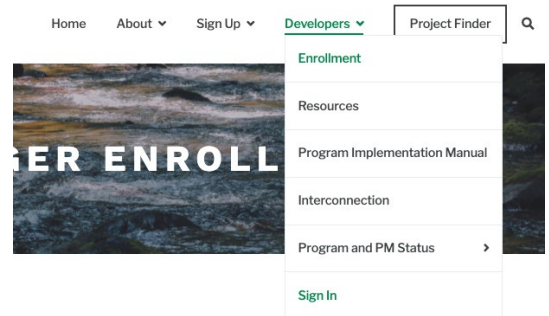


Pre-certification Tutorial

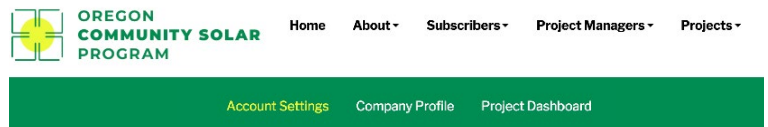
Project Manager Registration

In order to submit a Pre-certification application for review, you must be registered as a Project Manager. Click “Get Started” on the oregoncsp.org/pm-registration page to fill out a registration form. Once the Program Administrator has approved your enrollment, click **Sign In** to be directed to the login page, or go to portal.oregoncsp.org.



Project Manager Portal

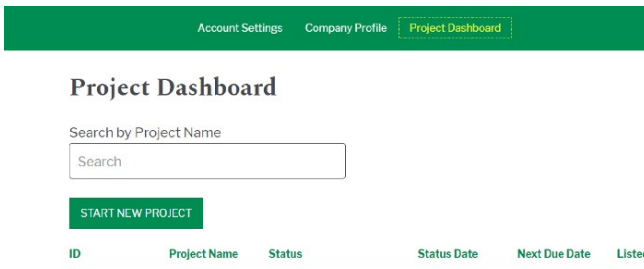
Once you’ve logged in, you will be able to view an additional menu where you can access your account settings. From the Account Settings page, you may invite additional staff within your organization to log in, edit, and submit applications on the Project Manager’s behalf.



Account Settings

Your organization is registered.

Clicking on **Company Profile** allows you to edit company and contractors, affiliate and partnership information, as well as view the mandatory training videos, and upload or download required W9 and insurance documents associated with Project Manager registration.



The **Project Dashboard** page is where you can view all the applications created by your Project Manager account in various stages, including draft applications. Click “Start a New Project” to create a new Pre-certification application.

Creating a New Pre-certification Application

When you begin the Pre-certification application process, the project will automatically be assigned a Draft number (e.g.: Draft-90). You must complete all sections of the Application tab and Documentation tab in order to be able to pay the application deposit and submit the application for review. Please note that certain Pre-certification documents may be added to the list of required documents to upload depending on the information entered in the Application tab.



Completing the Pre-certification Application Tab

The Pre-certification application tab consists of eight sections, below. Please ensure you save each section individually by clicking **Save** at the bottom right corner of each section's box.

1. SOLAR SYSTEM OWNER

Provide the name of the corporate entity that is the owner of the proposed physical solar installation, if different from the designated Project Manager.

2. CONTRACTORS, AFFILIATES, AND PARTNERS

This section is required if the Project Manager will be working with additional contractors, affiliates, and partners. For each additional entity, provide contact information, project role, and any recognized company certifications, if applicable. Click **Add More** to enter more than one entity. There is no limit to the number of entities that can be listed.

3. SOLAR PROJECT INFORMATION

Provide the project name and utility jurisdiction of the proposed solar project here. Once this section is saved, the project title will update from a draft number to the project name entered here and will display on the Project Dashboard.

Each project may be associated with one or more solar installation sites. Enter the number of discrete sites and fill out the location, system, permit, and interconnection information for each separate site.

4. EXPECTED PROJECT COSTS

Provide costs associated with all installation sites of the project. Cost categories are provided, and you may click **Add More** to add additional categories and costs.

5. PROJECT DEVELOPMENT TIMELINE

Provide the target dates for each milestone associated with the project. You may enter past dates for milestones that have already occurred. This section should be updated every six months or until all milestones have been achieved.

6. SUBSCRIPTION AND PRICING

This section details the subscription and pricing options that will be made available to subscribers once the project is Pre-certified. Project Managers must enter one or more pricing products and select which pricing product(s) they would like displayed on the public Project Clearinghouse. Alternative pricing structures, off-bill pricing structures, or additional fees or penalties not shown may also be added.

7. CUSTOMER ALLOCATION AND ACQUISITION

Provide the anticipated number and percentage of low-income, non-low income residential and small business, and large commercial agricultural and industrial customers for the project, as well as the anticipated percentage of

project capacity to be subscribed upon certification. Additionally, provide your approach to recruiting the required percentage of low-income customers for your project. The Low-Income Facilitator will contact you to discuss your plan based on the information provided.

8. SPECIAL PROJECT DESIGNATIONS

Indicate whether the project is designated a **Low-Income**, **Workforce Diversity**, **Brownfield Reuse**, or **Dual Agriculture Use** designation based on the descriptions provided. This information will be displayed on the Project Clearinghouse once the project is Pre-certified.

Completing the Pre-certification Documentation Tab

Once the Application tab is completed and each section is saved, upload the required documentation. The Proof of Interconnection Status and Draft Plan Set are required for all projects. Other documents, such as non-ministerial permit documentation or documentation of special project status qualifications, may be required based on the information provided in the Application tab.

Application	Documentation	Submit	Administration	Notes
PRE-CERTIFICATION DOCUMENTS				
Proof of Interconnection Status	New upload required	NEW		
Draft Plan Set	New upload required	NEW		

Please note that Proof of Interconnection Status is satisfied by either a document showing a completed interconnection study, or a paid application deposit for projects eligible for the Designated Carve Out.

Submitting Your Pre-Certification Application

Once all required information is entered in the Application Tab and the required documents have been uploaded, you may pay the application deposit and submit your application for review. Application deposits are automatically calculated based on the kW-AC system size of the project and may be submitted via PayPal or by check. Click **Pay by PayPal** or **Pay by Check** to continue. The platform will automatically check for any missing information or errors found on the application. The form must pass all validations before you may continue to payment instructions.

Once the PayPal payment is complete or the check instructions are displayed, you may click "Submit". Once submitted, the project will be assigned a project ID starting with the utility territory and year.

Application	Documentation	Submit	Administration	Notes
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Check Your Application

Click below to check your application for errors or missing documentation. Applications may not be submitted until the validation is complete.

Application Deposit and Project Submission

The fee for this project is \$0.00. Payment may be submitted via PayPal or by sending a check to the Program Administrator. For PayPal payments, please note that there is a limit of \$10,000 per transaction and each transaction may be subject to a non-refundable processing fee.

Once the PayPal payment is complete, you will return to this page to submit the application for review. Your application will not be reviewed until your application is submitted.

[PAY BY PAYPAL](#) [PAY BY CHECK](#)

PGE-2019-89

Status: Pending
Stage: Submission

Application	Documentation	Submit	Administration	Notes
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Thank you for mailing a check in the amount of \$10,000.00.

Submission Complete